Rational. Focal Point

IBM

IT Portfolio Management Configuration Add On 1.1 Deployment Guide

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IBM Rational Focal Point IT Portfolio Management Configuration Add On 1.1
Deployment Guide
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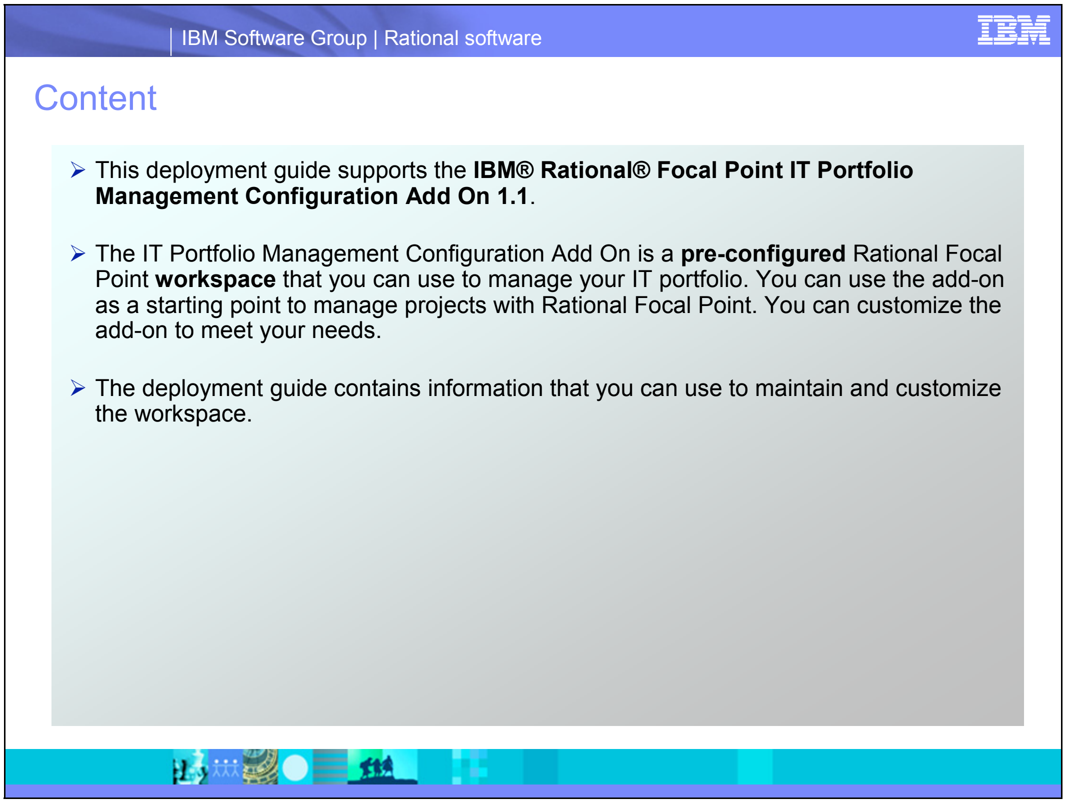
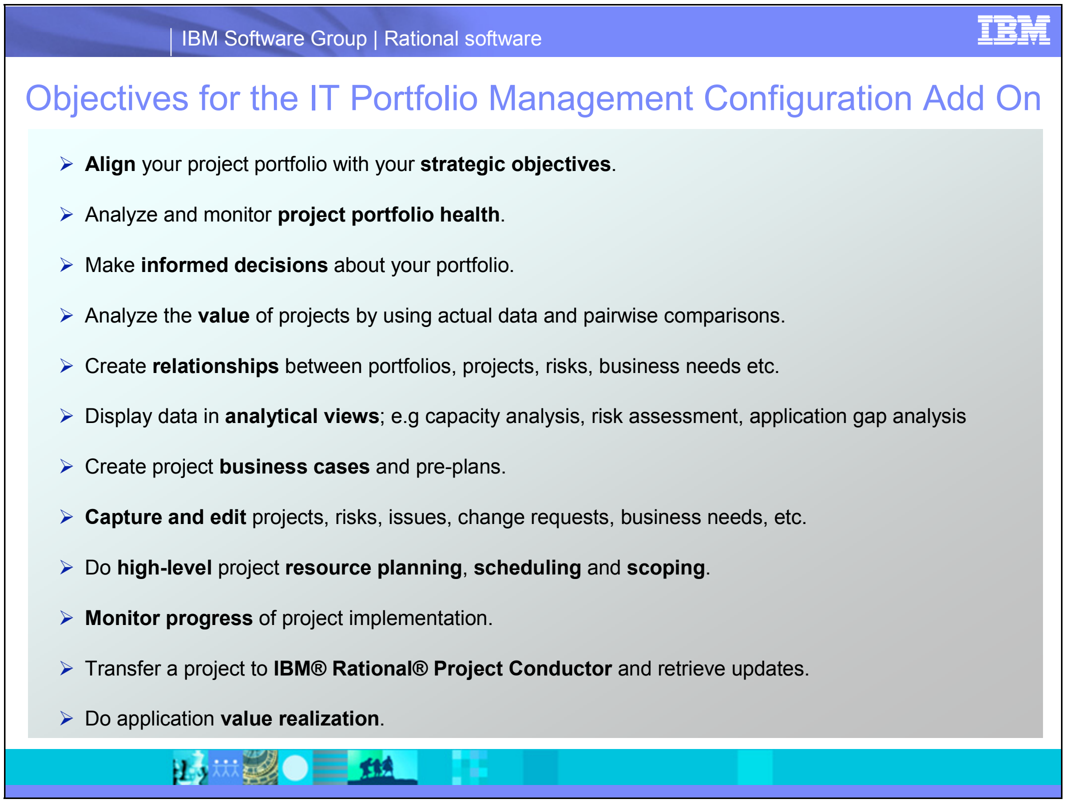
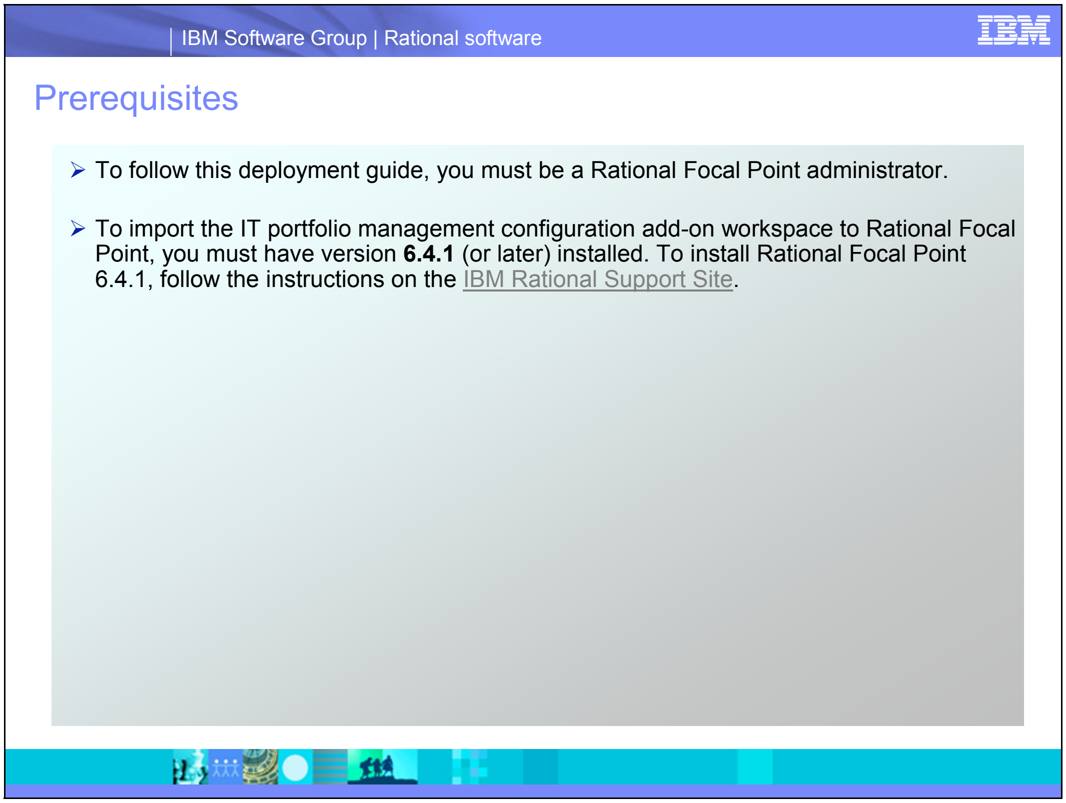


After you import the IT portfolio management configuration add-on workspace into Rational Focal Point, you can use it without making changes. However, you might want to customize the workspace to suit your the needs. You can configure Rational Focal Point so that your workspace will best fit within the way you want approach IT portfolio management. This deployment guide contains instructions to complete both required and optional configuration activities. It also contains details about the workspace so that you can understand how it works.

Objectives for the IT Portfolio Management Configuration Add On

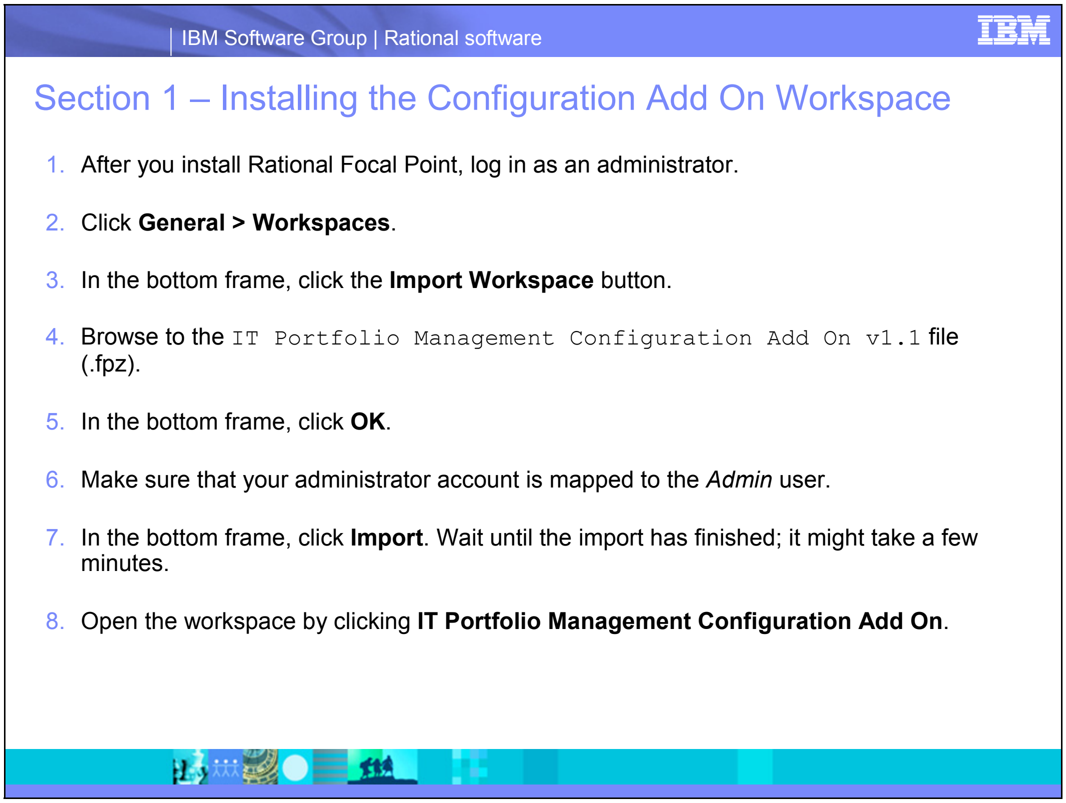


Prerequisites

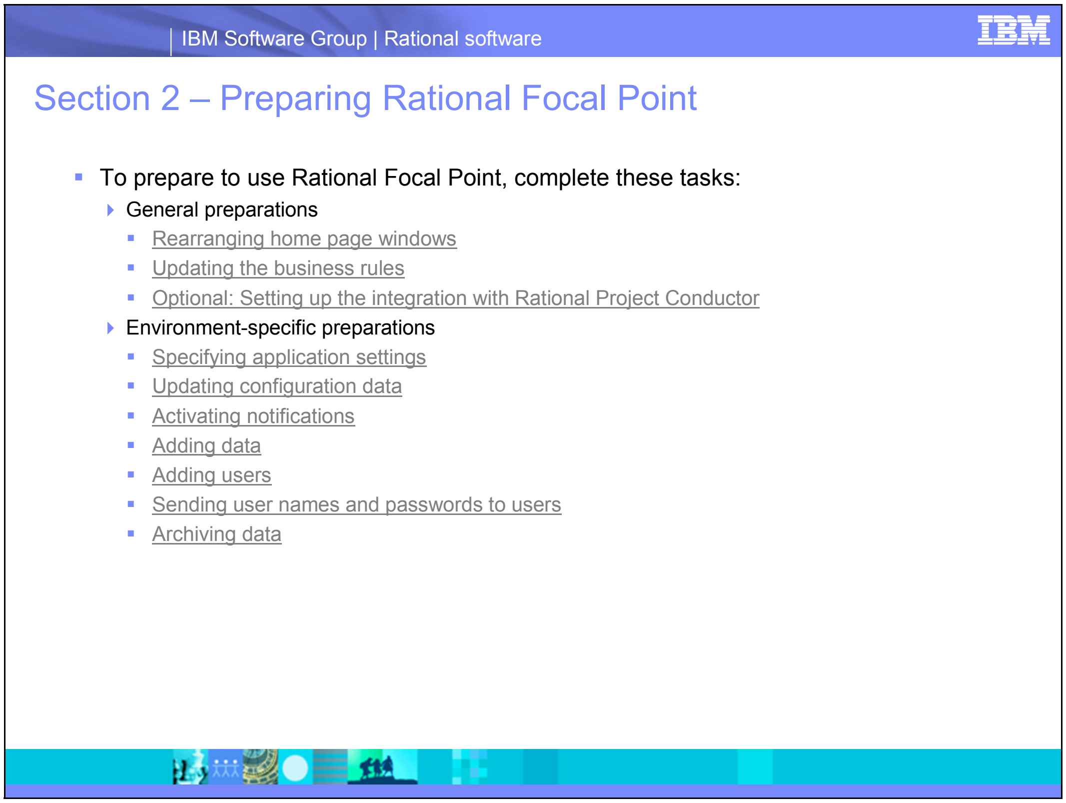


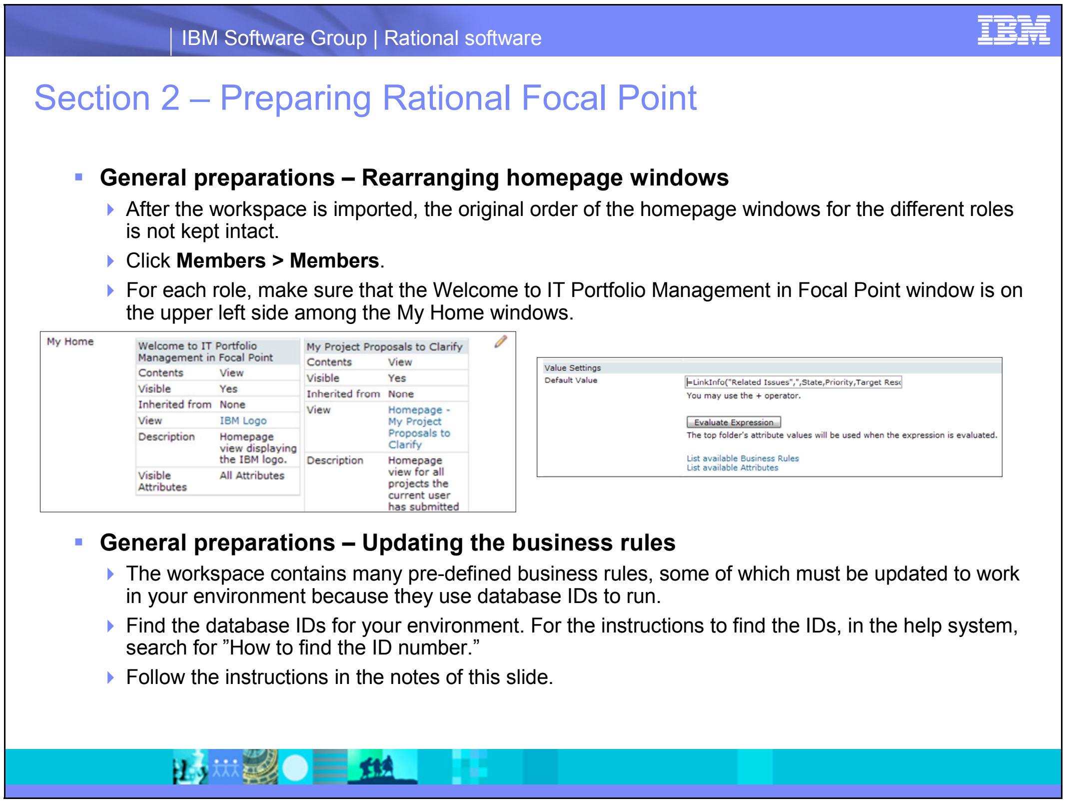
IBM Rational Support Site

Section 1 – Installing the Configuration Add On Workspace



Section 2 – Preparing Rational Focal Point





LinkInfo is in the Projects module in the Issue Info, Change Requests Info and Risk Details attributes:

1. Click **Configure** > **Attributes** > **Projects** > **Issue Info**.
2. In the **Default Value** field, update the business rule: Replace the parameter 13 with the ID of the Admin member in your environment.
3. Click **Copy Default Value To All Elements**.
4. Update the Change Requests Info and Risk Details attributes by clicking **Configure** > **Attributes** > **Projects** > **Change Requests Info** and **Configure** > **Attributes** > **Risk Details** and following steps 2-3.

SetChoice is in the Risks module in SetChoice – Priority attribute.

To update the attribute:

1. Click **Configure** > **Attributes** > **Risks** > **SetChoice – Priority**
2. In the **Default Value** field, update the business rule. The business rule currently contains this information: =SetChoice("438","303","true","303_1","304_2","305_3",'SetChoice Helper'). Replace the following parameters with the database IDs of your own environment:

ID	Explanation
438	The attribute ID of the Priority attribute in the Risks module
303	The Choice item ID for 1 – High in the Priority attribute in the Risks module
304	The Choice item ID for 2 – Medium in the Priority attribute in the Risks module
305	The Choice item ID for 3 – Low in the Priority attribute in the Risks module

3. After the IDs are updated, click the **Copy Default Value To All Elements** button

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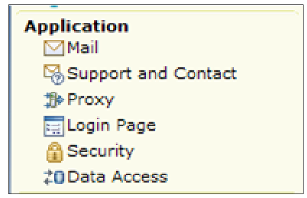
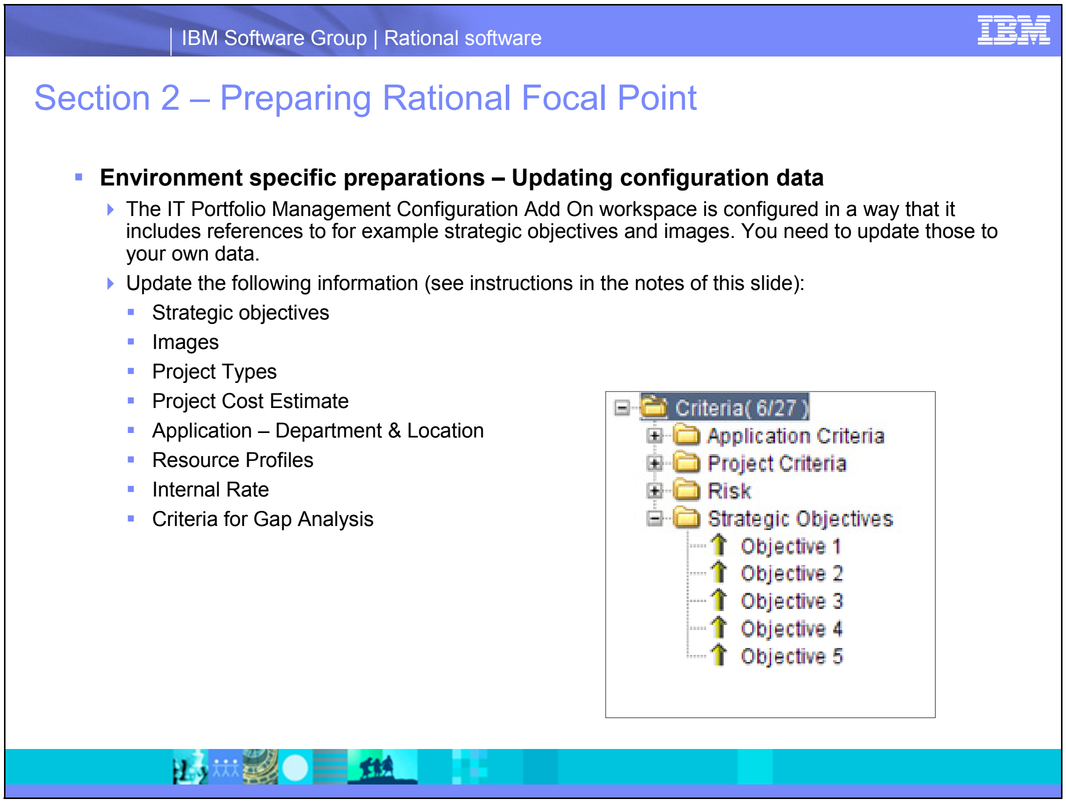
Section 2 – Preparing Rational Focal Point

- **Environment-specific preparations – Specifying application settings**
  - For Rational Focal Point to send account information, e-mails, notifications, and exceptions, the e-mail settings must be correct. Your IT staff might need to determine the proper settings.

1. Click **Application > Mail**. Double-click the following information to edit it:
   - Set the SMTP Host and SMTP Port attributes according to your environment.
   - Set the Rational Focal Point Server Mail Name to the name that is in the **From** field in e-mails sent from Rational Focal Point.
   - Set the Rational Focal Point Server Mail Address to the inbox that is established for handling system-related e-mails.
   - Set the Default Mail Footer, to provide, for example, a support number to call.
   - Set the Mail Format (HTML, Plain Text, or Mixed).
2. Click **Application > Support/Contact** and set the Support and Contact Information attributes.
3. Click **Application > Login Page** and set the Login or Balancer URL to the appropriate string. Set the URL to be the same URL that is used to log in to Rational Focal Point; for example, http(s)://focalpoint.example.com/fp/servlet/Login.





Strategic objectives

1. Click **Modules** > **Criteria** > **Strategic Objectives**.
2. Update the Title of the strategic objectives to reflect your own strategic objectives. To reach the number of strategic objectives that you want, add or delete objectives.
3. For each strategic objective, also enter the Weight attribute. Enter the number in integers as percent, because the weight is the importance that the objective has relative the other strategic objectives. For example: Objective 1 – 13, Objective 2 – 26, Objective 3 – 20, Objective 4 – 8, Objective 5 – 32.
4. Select the **Strategic Objectives** folder and edit the Importance attribute.
5. Enter the weight for the strategic objectives.

Images

1. Click **Modules** > **Images**.
2. Click the IBM element. To change the logo image, double-click the Title row and browse to your own logo image file.
3. Optional: Click the Process element. To change process image, double-click the row below Process and then browse to your own process image file.
4. Click **Configure** > **Views** > **Images** > **Logo**.
5. Edit the View Definition and update the rule to contain the name of file.

Project Type

1. Click **Configure > Projects > Type**.
2. Update the project types that you prefer to capture.

Project Cost Estimate

1. Click **Configure > Projects > Total Project Cost**.
2. Update the cost levels to what is reasonable for you.

Application – Department & Location

1. Click **Configure > Applications > Department**.
2. Update the department names to those of your own.
3. Click **Configure > Applications > Location**.
4. Update the location names to those of your own.

Resource Profiles

1. Click **Modules > Resource Profiles**.
2. Add the resource profiles that you have in your organization and their current rates. You can use the resource profiles that are used in the project management tool (for example, Rational Project Conductor). Examples: Senior Developer, Process Owner, DBA, Junior Developer, Tester, Project Manager, Program Manager.

Internal Rate

The internal rate is used to calculate the Net Present Value (NPV) for the projects. The default internal rate is 15%. Only users with the role Executive Stakeholder, Finance, or Steering Committee can change this by using the Edit Internal Rate view. Because the internal rate exists in the hidden Supporting Module, the administrator must make that module visible to change the internal rate. Alternatively, to change the rate, the administrator can temporarily change roles to either of the above mentioned roles. To change roles and move your admin user to the corresponding folder or role, use the Display > Change Roles view. Wait until the browser is refreshed. When you are finished making changes, remember to change back to the Administrator role.

Criteria for Gap Analysis

1. Click **Modules > Criteria**.
2. Open **Application Criteria > Gap Analysis** folder. Six criteria are in this folder: three User Need criteria and three User Satisfaction criteria. Set up these criteria to be used by users that have the Application Gap Analyst secondary role. Details on roles are described in Section 4: Roles and Homepages.
3. Assume that the user John Smith is added as a member to the workspace and is assigned the role Business Stakeholder and the secondary role Application Gap Analyst. To provide John with the required criteria to complete gap analyses, you must select John as the Gap Analyst for a User Need criterion and a User

Satisfaction criterion. Mark the criteria, edit the Gap Analyst attribute, and select John Smith. You can use the remaining criteria in the Gap Analysis folder for other users who are Application Gap Analysts.

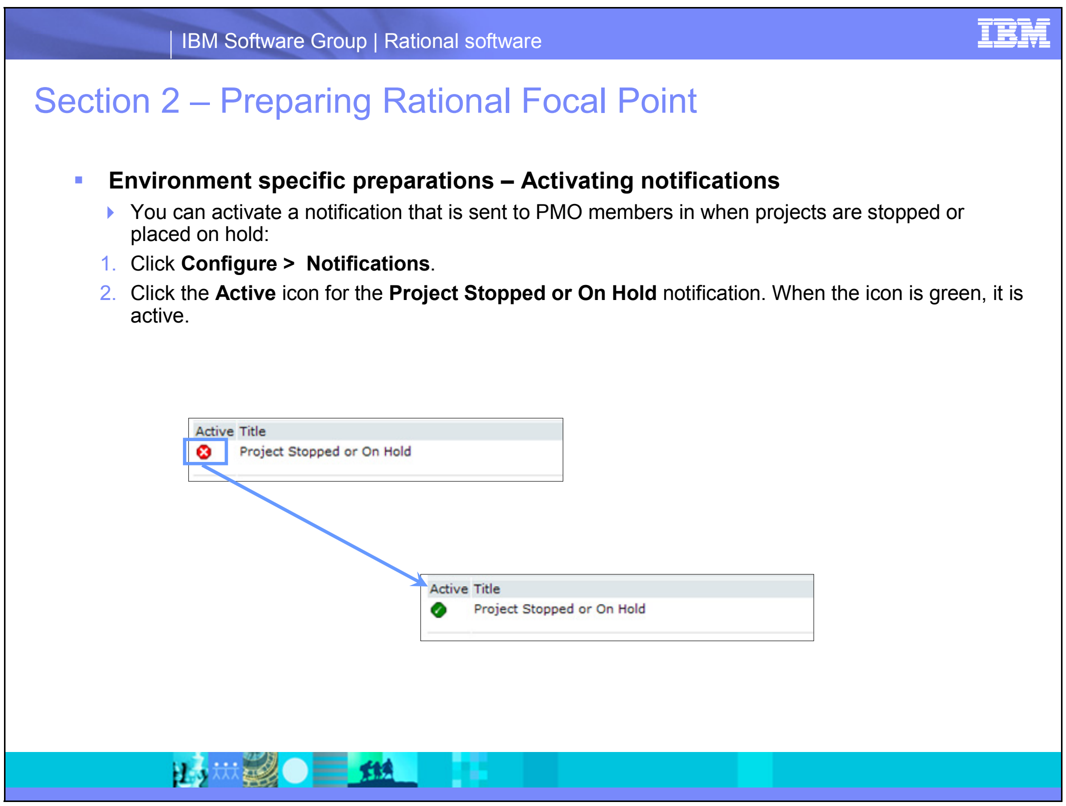
4. Because only six criteria for Gap Analysis are created by default, you must create one pair (User Need and User Satisfaction) for each application gap analyst that you set. To create a criterion, click the **Add Criterion** button. The Title should be:

   ="User Need: " + 'Gap Analyst' for the User Need criterion

   And

   ="User Satisfaction: " + 'Gap Analyst' for the User Satisfaction criterion.

5. Select the user in Gap Analyst.



It is possible to create additional notifications for other notification needs in your organization.

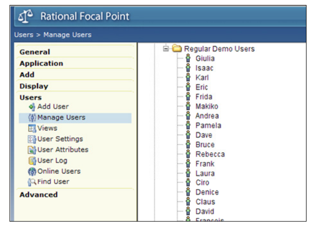
Section 2 – Preparing Rational Focal Point

- **Environment specific preparations – Adding data**
  - To import projects, business needs, or any other type of elements to Rational Focal Point, the elements must first be in a Microsoft® Excel file. The required columns are Id and Title, but you can import information to any attribute in the module.
  - Organize your imports in a certain order so that links between elements can be set. For example, if you have a link from your business needs to your projects, import the projects first. When you then import the business needs, you can include a link column in your Excel file with links to the projects, and these links will be automatically created during the import. The module that contains the incoming links should have its elements imported first.
  - To Import data:

1. Click **Modules** and select the module in which to import your elements.
2. In the bottom frame, click the **Import <*Module Name*> button**.
3. Browse to the Excel file.
4. Click **OK**.
5. Make sure that the columns in the Excel file match the attributes in Rational Focal Point.
6. In the bottom frame, click **Import**. Do not use the browser until the import is finished.

Section 2 – Preparing Rational Focal Point

- **Environment specific preparations – Adding users**
  - To add users, you first add the users to the database and then add them to the workspace.
  - Adding users to the database:
    1. Outside of the workspace, click **Users > Manage Users**.
    2. Click **Add User**.
    3. In the corresponding fields, enter the user's full name, user name, and e-mail address.
    4. Click **OK**.



  - Adding users to the workspace:
    1. Open the IT Portfolio Management Configuration Add On workspace.
    2. Click **Members > Members**.
    3. Click the folder to add the users to. Each folder represents a role. For details about roles, see Section 4 .
    4. Click **Add Member**.
    5. Search for the user to add to the workspace. To list all users, press Enter.
    6. Select the user to add by selecting the user's check box.
    7. Optional: Search for the next user to add and select that user's check box. Continue until you have selected all of the users that you want to add. If you are adding many users to a workspace simultaneously, add 50-100 users at a time for best performance.
    8. Click **Next**. Wait until the next page has finished loading. Depending on how many users you added, the page might load slowly.
    9. Click **Finish**. Wait until the users are added. Depending on how many users you added, the page might load slowly.
    10. Verify that the user inherits access to views from the role by selecting a user that you added. Edit the Inherit From attribute and select **Parent Folder**.

Add multiple users

You can also add multiple users in the database. To do so, all of your users must be listed in an Excel file. The Full Name and User Name columns are required, and you might also use the E-mail and Access columns.

1. Outside the workspace, click **Users > Manage Users**.
2. Click **Import Users**.
3. Browse to the Excel file in which you keep your users.
4. Click **OK**.
5. Make sure that your columns in the Excel file match the attributes.
6. Click **Import**. Do not use the browser until the import is finished.

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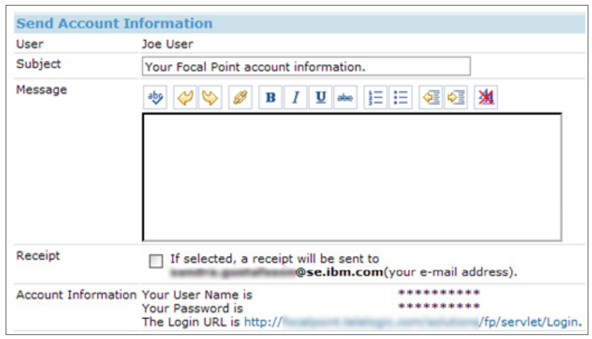
Section 2 – Preparing Rational Focal Point

- **Environment specific preparations – Sending user names and passwords to users**
  1. Click **Users > Manage Users**.
  2. Select the users to whom you want to send user names and passwords. The users must have valid e-mail addresses.
  3. Click **Send Account Information**.
  4. Write a message to the users. The user name, password, and the login URL are included automatically.
  5. To send the message by e-mail, click **OK**.



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Section 2 – Preparing Rational Focal Point

- **Environment specific preparations – Archiving data**
  - Make sure that you have a plan for archiving data.
  - Depending on the amount of data that is to be stored in Rational Focal Point, you might also need to rethink the configuration with regards to modules, views, and attributes.
  - For example, you might have a state for archived elements. Elements in this state are not included in views. If the module becomes oversized, you can create a separate module or workspace to which old data is moved.

Section 3 - Modules

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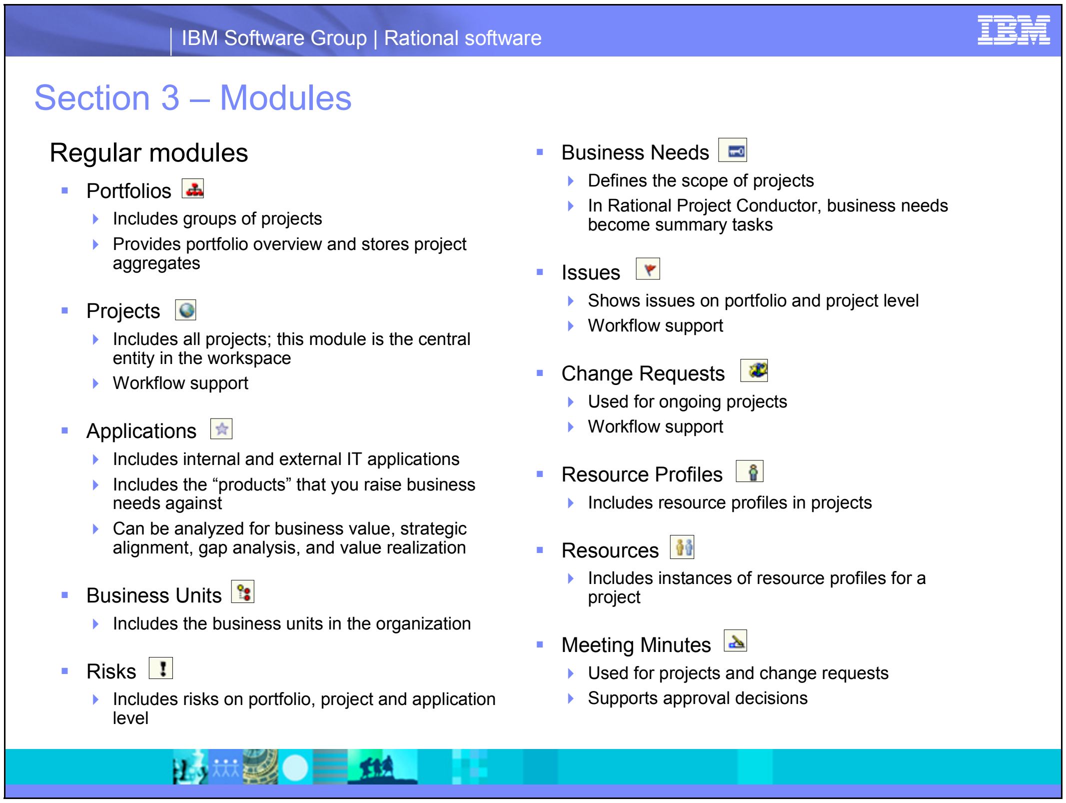
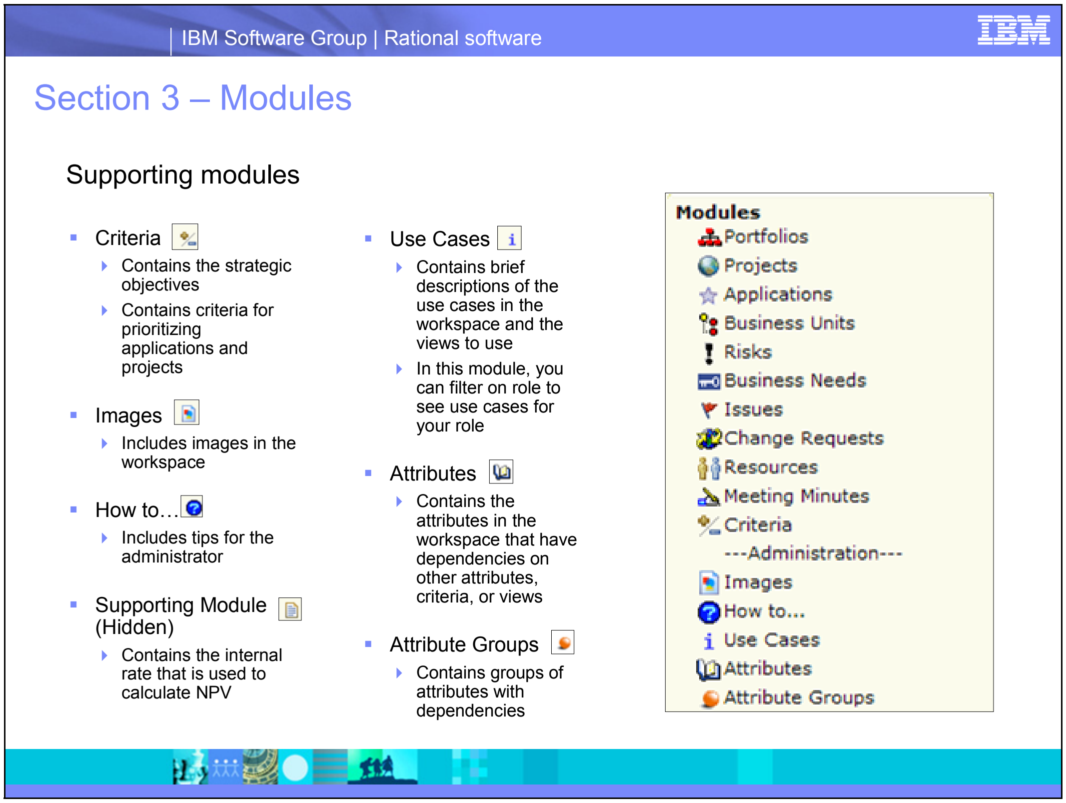
Section 3 – Modules

- The IT Portfolio Management Configuration Add On workspace contains 18 modules.
- You can find the modules by clicking **Configure > Modules**. For details about each module, see the general descriptions on the next slide.
- If you do not want to use a particular module, you can delete it. If you delete a module, make sure that you handle any dependencies to the module (see Section 9 – Dependencies and groups).



The icons for each module are also visible as the icon in front of each view that is based on that module. You can use the icons to easily find the modules. Users can sort their views in these module groups by following these steps:

1. Click **Preferences > Miscellaneous Settings**.
2. Under View Sort, select **By Attribute > View Definition**.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Section 3 – Modules
Supporting modules
Criteria
Contains the strategic objectives
Contains criteria for prioritizing applications and projects
Images
Includes images in the workspace
How to…
Includes tips for the administrator
Supporting Module (Hidden)
Contains the internal rate that is used to calculate NPV
Use Cases
Contains brief descriptions of the use cases in the workspace and the views to use
In this module, you can filter on role to see use cases for your role
Attributes
Contains the attributes in the workspace that have dependencies on other attributes, criteria, or views
Attribute Groups
Contains groups of attributes with dependencies
Modules
Portfolios
Projects
Applications
Business Units
Risks
Business Needs
Issues
Change Requests
Resources
Meeting Minutes
Criteria
---Administration---
Images
How to…
Use Cases
Attributes
Attribute Groups

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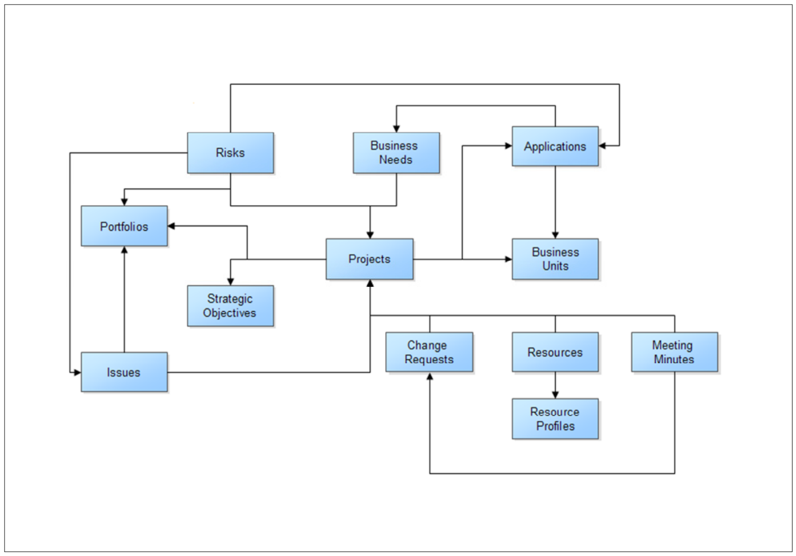
Section 3 – Modules

- Information model



This information model shows how the modules in the IT portfolio management configuration add-on workspace are related to each other through links.

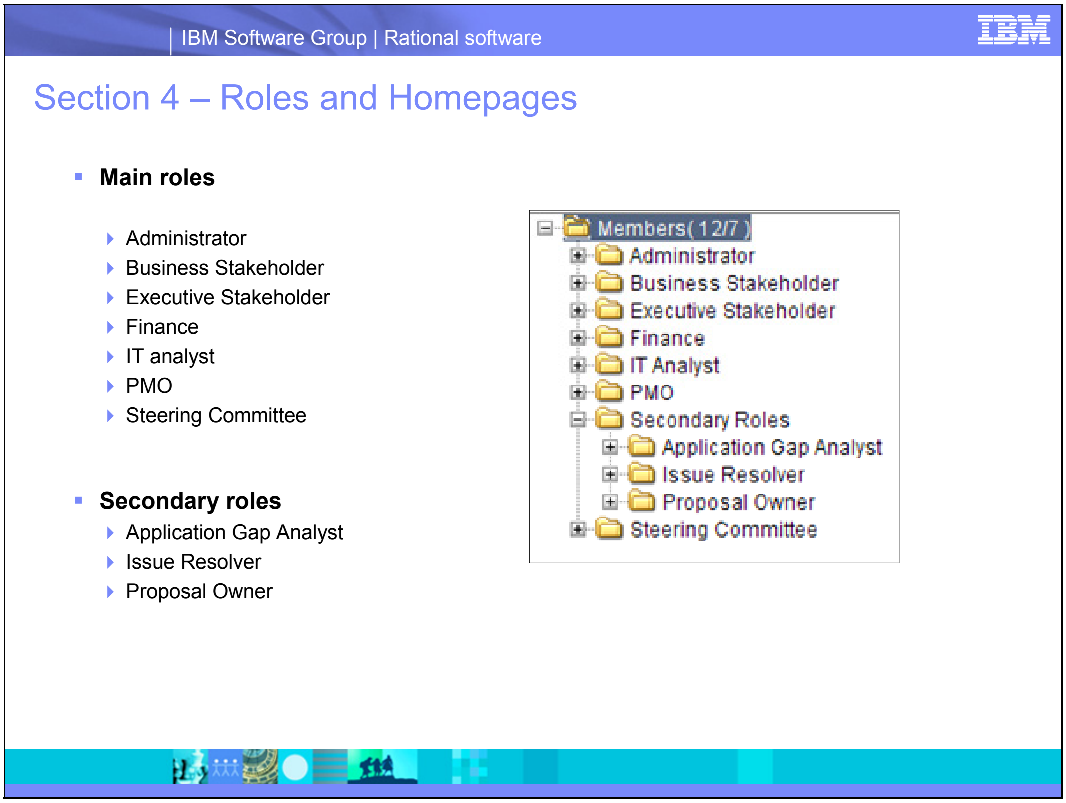
Note: This model does not include the following information:

- Relationships with the Members module (for example, for links to the IT analyst, risk owner, or application owner)
- Modules that support the configuration, such as Images, Use Cases, How to..., Supporting Module (hidden), Attributes and Attribute Groups
- The Criteria module, which contains the Strategic Objectives

Section 3 – Modules

- Adding modules in the workspace:
  - When you add a module, create the necessary views and assign them to the appropriate roles.
- Deleting modules in the workspace:
  - Before you delete a module, consider whether any other modules have dependencies on that module. For more information, see Section 9: Dependencies and groups.
- Adding attributes in a module:
  - When you add more attributes to an existing module:
    - Make sure that you include the new attribute in the correct views (not visible, visible, or editable). View any similar attributes and the views that they are included in, and copy those attributes as appropriate.
    - If you add attributes in the Projects, Issues, or Change Requests modules, consider the workflow definition. After you create the attribute, click **Configure > Workflow > [Module]** and update the settings for the states and the transitions so that those settings fit your purpose with the attribute.
- Deleting attributes in a module:
  - Before you delete an attribute, consider whether any other attributes have dependencies on that attribute. For more information, see Section 9: Dependencies and groups .

Section 4 – Roles and Homepages



Main Roles: The IT Portfolio Management workspace includes a set of pre-defined roles. All members of the workspace should have a main role. In the Members > Members view, place users in the folders of their main role. The pre-defined roles in the Members > Members view are described below.

All users can complete the following tasks:

- Add and display project proposals and business needs
- Handle change requests
- Own risks
- Investigate business needs
- Read all delivered and rejected proposals, all change requests, and the process diagram
- View use cases to help users understand which Rational Focal Point view to use for what tasks

A list of all administrators is provided to all users in case they need help or access.

Secondary Roles: Sometimes a person needs to be selected to complete a task; for example, to create the business case for a project proposal. To complete a task, any person can be assigned a secondary role in addition to their main role. There are three pre-defined secondary roles: proposal owner, issue resolver, and application gap analyst.

Assign at least one person as the proposal owner and at least one person as the issue resolver. The application gap analyst role is necessary if you want to allow certain people vote on the need and satisfaction level for applications to support the application gap analysis. To manage secondary roles, click **Members > Members > [Select member] > Secondary Roles**.

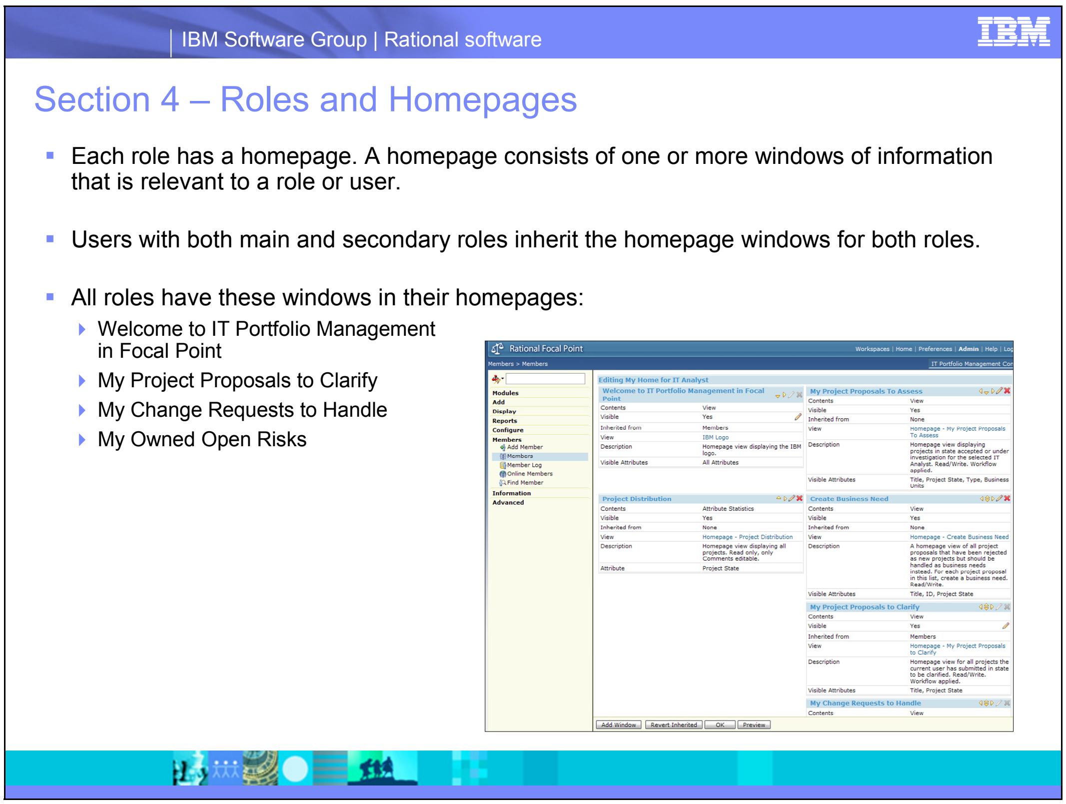
Main roles:

- **Administrator –** Administers Rational Focal Point and updates and maintains the configuration of the IT portfolio management workspace
- **Business Stakeholder** – This role is primarily read-only. It is for users in the organization who are interested in information stored in Rational Focal Point. As all other main roles, the business stakeholder can add project proposals and business needs. The business stakeholder can also be assigned to handle change requests, own risks, or investigate business needs.
- **Executive Stakeholder** – This role is an executive with interest in the project portfolio and the overall portfolio situation, but who does not have access to make approval decisions or prioritize projects.
- **Finance** – This role is primarily read-only. People in the finance role can edit internal rate and financial data; for example, financials (budget, planned, actual) for projects and applications.
- **IT Analyst** – This role is part of the IT organization in the business. The IT analyst does first and second assessment of projects proposals. The first assessment is to determine whether a proposal is a project or something else. The second assessment is to do the initial estimation of the project proposal.
- **PMO** – Creates the pre-plan for a project after it has been approved. The pre-plan includes defining the resource demand, the scope, and the target dates. The PMO also transfers projects approved for implementation to Rational Project Conductor and then monitors their progress by retrieving regular updates in Rational Focal Point. In addition, the PMO manages business needs, change requests, and issues.
- **Steering Committee** - Makes approval decisions about the project portfolio. Approves business cases, prioritizes project proposals (value analysis), reviews the project road map, does capacity analysis and project implementation approvals, and approves change requests. The steering committee also monitors the portfolio health, analyzes project balance, reviews strategic alignment of projects, and analyzes the portfolio risk scorecard.

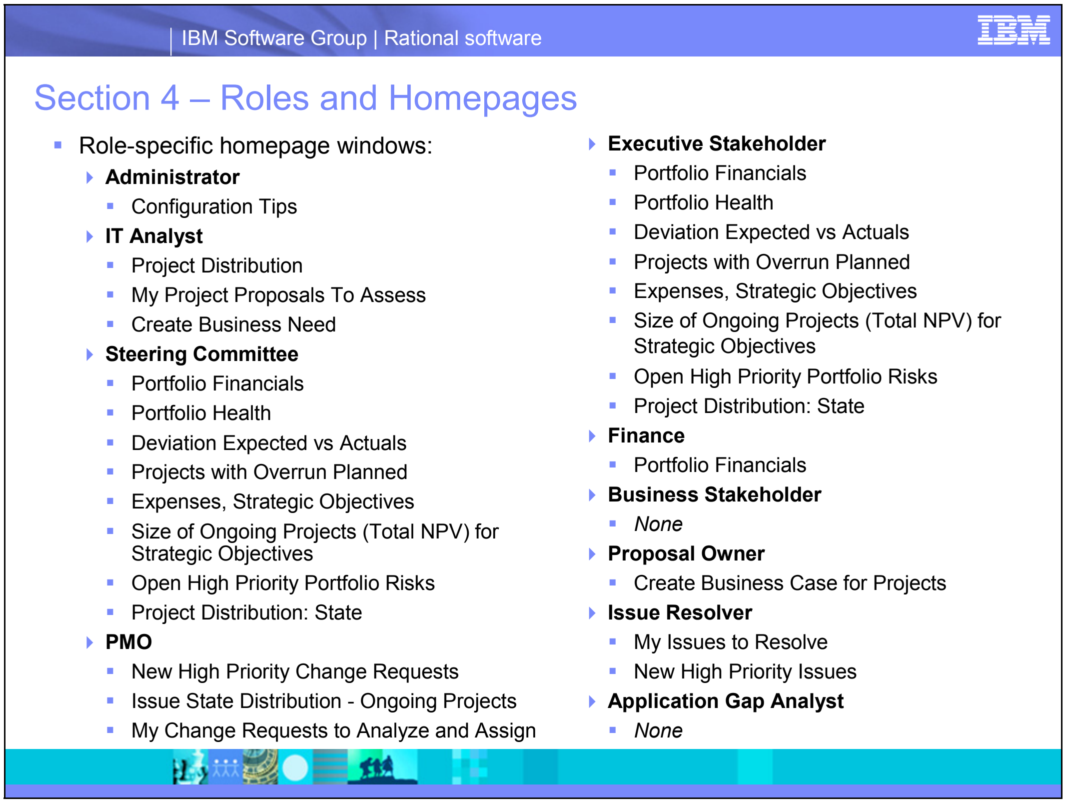
Secondary roles:

- **Application Gap Analyst** - Can vote on how much they need a certain application and how much they are satisfied with the same application. The results of the application gap analysts' votes forms the application gap analysis chart.

- **Issue Resolver** – Reviews and handles issues related to ongoing projects. New issues are reviewed by users with this role. The issue resolver assigns the new issue. When the issue is resolved, the issue proposer accepts the solution.
- **Proposal Owner** – Provides the project proposal with a business case. The proposal owner can also be responsible for creating the pre-plan for the project with the PMO.



- Welcome to IT Portfolio Management in Focal Point – Contains the IBM logo and values. Replace the logo and values with your own logo and text.
- My Project Proposals to Clarify – Contains projects to be clarified by the user (the user is also the submitter of the project).
- My Change Requests to Handle – Contains change requests to be handled by the user.
- My Owned Open Risks – Contains risks that the user owns and that are in the open state.



Administrator

- Configuration Tips – Contains a list of configuration tips that might interest the administrator.

IT Analyst

- Project Distribution – Contains a statistical view of the projects distributed by state.
- My Project Proposals To Assess – Contains the project proposals that the user must assess.
- Create Business Need – Contains the proposals that are marked as business needs. The IT analyst must create a business need for each of these proposals.

Steering Committee

- Portfolio Financials – Contains financial details on the portfolio level.
- Portfolio Health – Contains portfolio traffic lights.
- Deviation Expected vs Actuals – Contains graphs that show deviation between expected and actual cost and benefits on the portfolio level.
- Projects with Overrun Planned Expenses– Contains ongoing projects for which actual expenses have overrun planned expenses by more than 20%.

- Strategic Objectives – Contains a graph that shows the importance of each strategic objective.
- Size of Ongoing Projects (Total NPV) for Strategic Objectives – Contains the total NPV of the ongoing projects, distributed by strategic objective.
- Open High Priority Portfolio Risks – Contains a list of portfolio level risks in the open state that are marked as high priority.
- Project Distribution: State – Contains a statistical view of the projects, distributed by state.

Project Management Office (PMO)

- New High Priority Change Requests – Contains a list of change requests in the new state that are marked as high priority.
- Issue State Distribution - Ongoing Projects – Contains a statistical view of issues for ongoing projects, distributed by the state of the issue.
- My Change Requests to Analyze and Assign – Contains a list of change requests for which the user is the analyst.

Executive Stakeholder

- Portfolio Financials – Contains financial details on the portfolio level.
- Portfolio Health – Contains portfolio traffic lights.
- Deviation Expected vs Actuals – Contains graphs that show deviation between expected and actual cost and benefits on portfolio level.
- Projects with Overrun Planned Expenses– Contains ongoing projects in which actual expenses have overrun planned expenses by more than 20%.
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- Open High Priority Portfolio Risks – Contains a list of portfolio level risks in the open state that are marked as high priority.
- Project Distribution: State – Contains a statistical view of the projects, distributed by state.

Finance

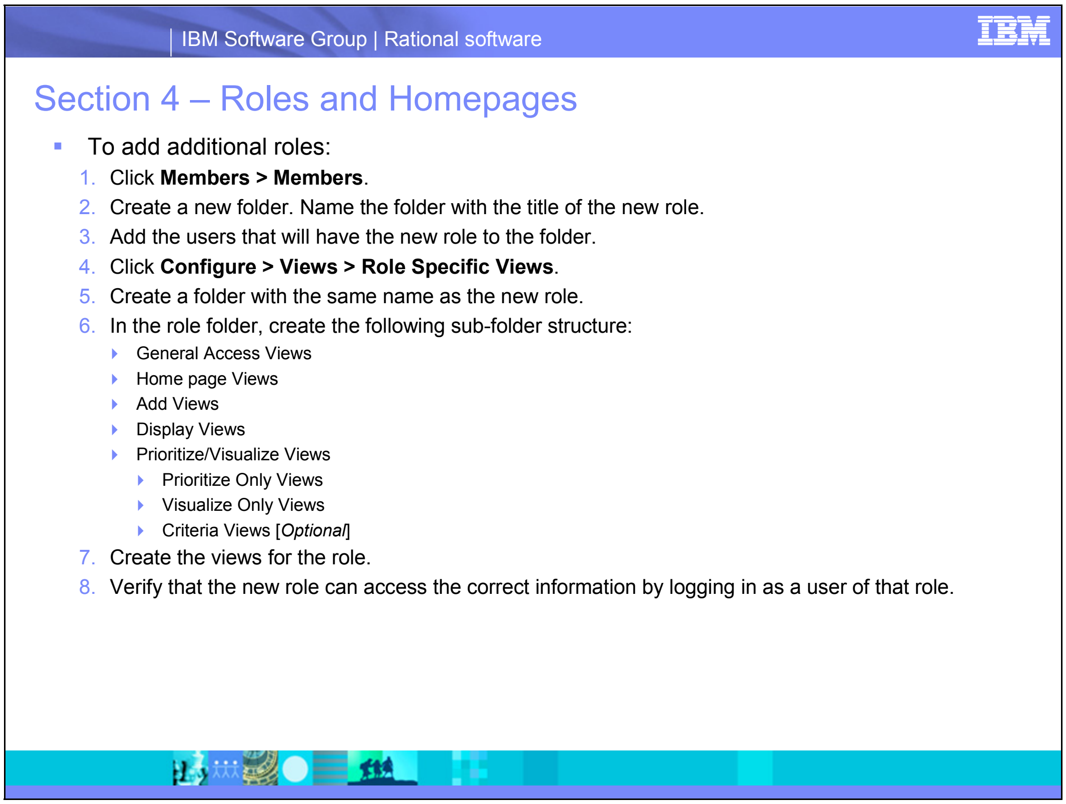
- Portfolio Financials - Contains financial details on the portfolio level.

Proposal Owner

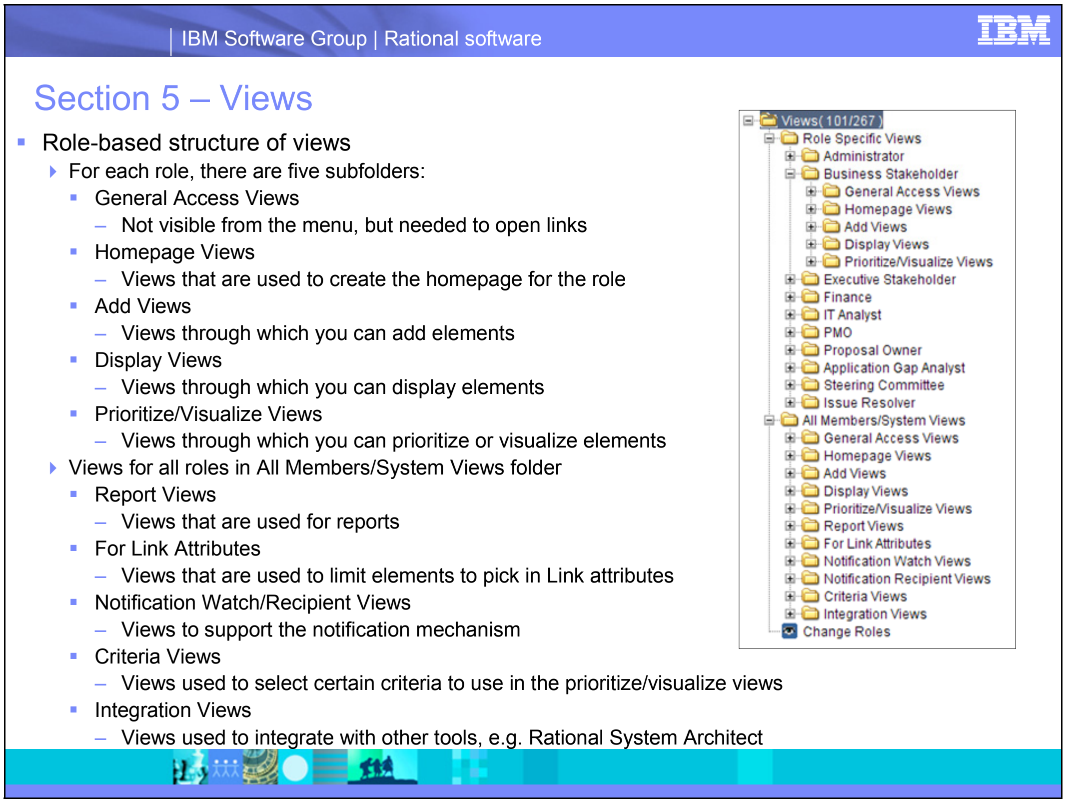
- Create Business Case for Projects – Contains a list of projects for which the user is the proposal owner and must create the business case.

Issue Resolver

- My Issues to Resolve – Contains a list of issues for which the user the issue resolver.
- New High Priority Issues – Contains a list of issues in the new state that are marked as high priority.



Section 5 – Views

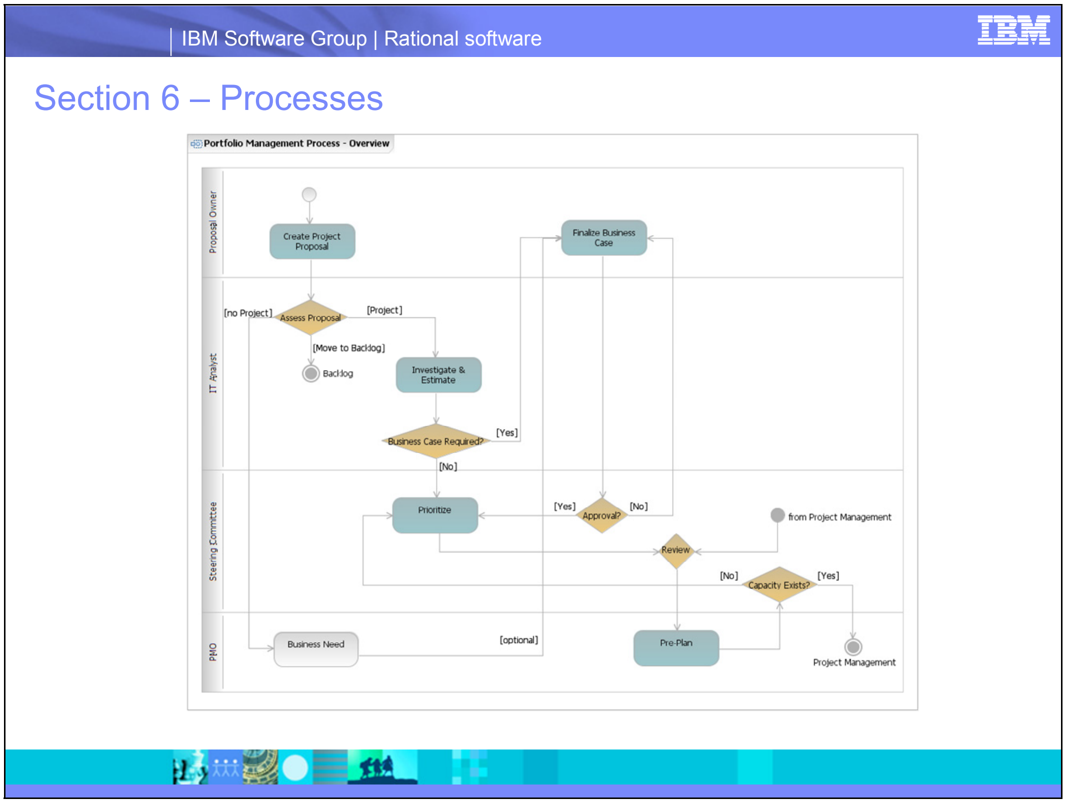


Note: Because each role has its own set of views, do not give a user another main role as the secondary role. For example, do not give an IT analyst the PMO role as a secondary role. If a user has a main role as a secondary role, they will have duplicate views.

Section 5 – Views

- To add more views:
  - Determine which roles will access the view.
    - If only one role will access the view, create the view in the subfolder for that role.
    - If more than one role will access the view, create a view for each role and place the views in the right subfolders.
    - If all members will access the view, create the view in the appropriate subfolder in the All Members/System Views folder.
    - If only certain users will access the view, create a new folder in the View structure in which you place all views that are assigned to individuals.
  - After you create the view, assign it to the roles or users by using the **Share View** button.

Section 6 - Processes



The process implemented in the IT portfolio management configuration add-on covers project proposal capture, estimations, business cases, reviews, high level planning, and capacity analysis before the project moves into Rational Project Conductor. The project proposal must pass through several approval gates as it moves through the process.

- All users can submit a project proposal. Submitters can later on in the process be assigned as the proposal owner of the project proposal by the IT analyst. If so, the submitter is also responsible for creating the project business case. A project can also be added through integration with IBM® Rational® System Architect. More on this in Section 8.
- The IT analyst determines whether the submitted proposal is actually a project or before he or she completes the initial investigation and estimations.
- Proposals that are not accepted as projects can be transformed into business needs (for example, an enhancement request against an existing application) or be moved into a backlog (for example, if the proposal is rather a defect in an existing application). What ends up in the backlog could be moved into other systems. Business needs can be included as scope items in the business case of the project.
- After the IT analyst has finished the initial investigation of the proposal, which can include high-level estimations of cost, scope, duration, and time of delivery,

the IT analyst can determine whether the proposal needs a business case. For example, a project that is expected to have a low cost and short duration might not require a business case. Such proposals are moved directly to the prioritization phase. However, the majority of projects need business cases, and for a business case, the IT analyst selects a proposal owner. The proposal owner can be the same person as the project proposal submitter. The business case might include the budget for the project, a risk assessment and initial scope definition. The scope is refined during the pre-plan phase.

- The steering committee makes an approval decision for project proposals with business cases. If a proposal is approved, it moves into the list of project proposals to be prioritized. If it is not approved, it can either be rejected or be returned to the proposal owner for further elaboration on the business case. Prioritization is done on regular basis; for example, quarterly. The steering committee gathers and votes on the proposals to understand their alignment with the strategic objectives, their value to the business, their cost, risk, and so forth. The result of the prioritization is a ranked list of projects in which the projects that score the highest considering all criteria are those that the business will focus on. Before approving those highest scoring proposals, the proposals are reviewed against ongoing projects to balance the portfolio.
- The PMO creates a pre-plan (a high level plan), for projects that the steering committee has voted as top priority. The pre-plan includes defining the scope in detail by associating business needs with the project, studying the budget and creating a financial plan, and determining the resource demand. The proposal owner can also help to create the pre-plan.
- Before it approves the projects for implementation, the steering committee reviews the pre-plan and studies the resource capacity. If capacity does not exist, it is considered in the next portfolio review when new projects are approved for implementation. If capacity exists, the project is approved and the PMO moves the project from Rational Focal Point into Rational Project Conductor. From that point, the project implementation is monitored from Rational Focal Point. It is measured to see if the schedule targets are met, if the business needs are implemented in time, and if the cost is within plan. It is also possible to raise issues and change requests against the ongoing projects.
- When the project is complete in Rational Project Conductor, it is set as delivered in Rational Focal Point.

Note: This process is implemented through the workflow engine in Rational Focal Point.

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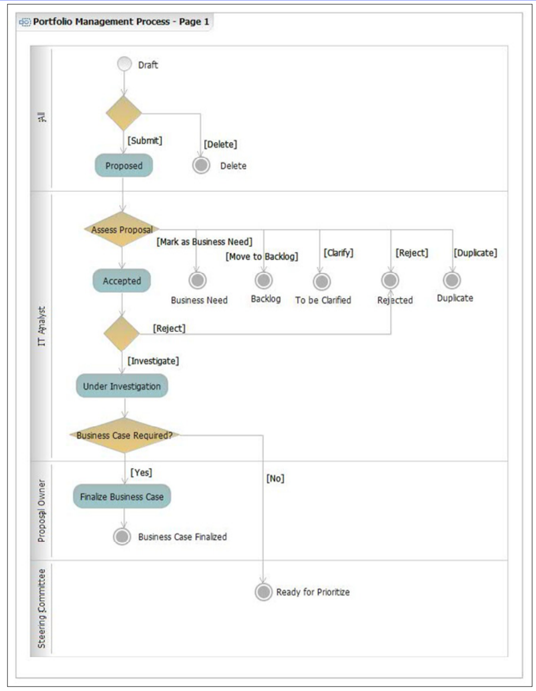
Section 6 – Processes

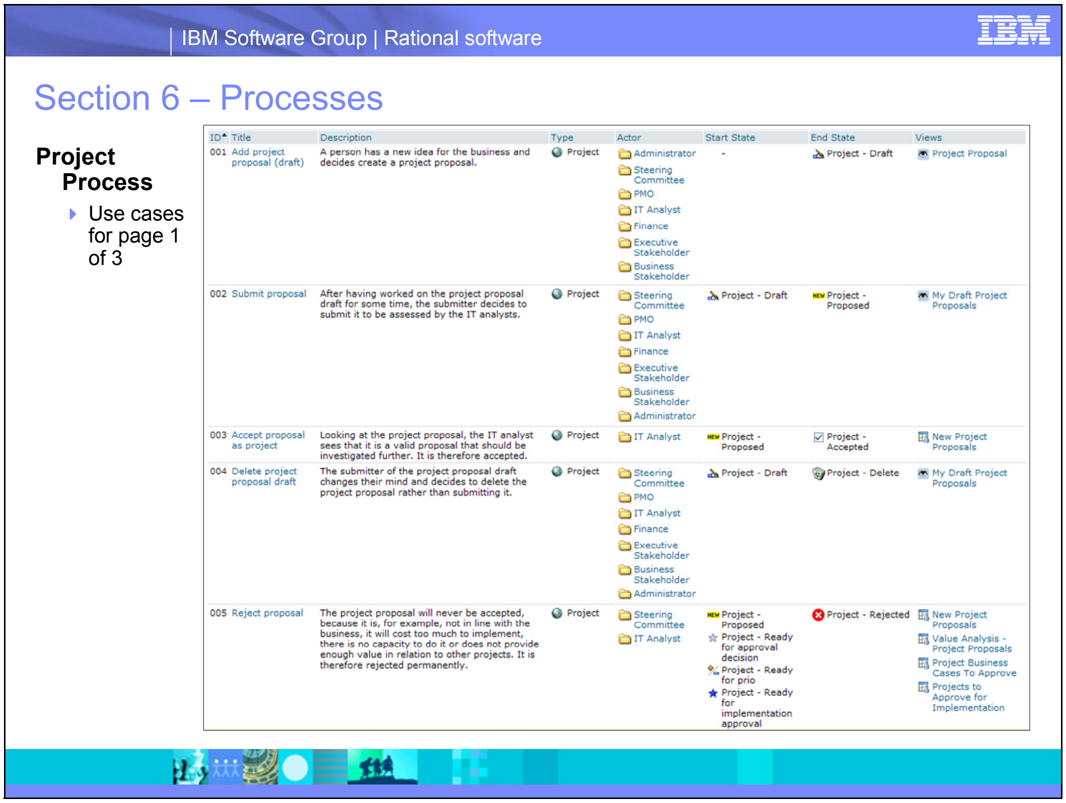
Project Process

- Page 1 of 3



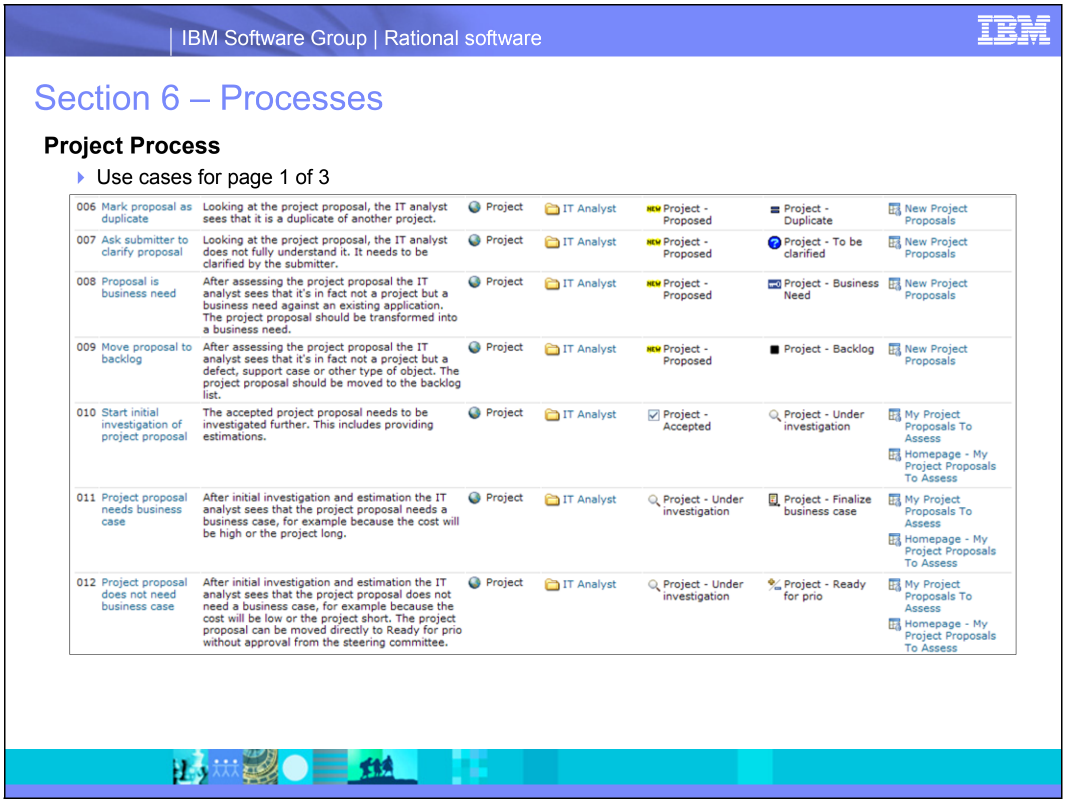
This screen capture is the first of three detailed process illustrations of the project flow in the workspace. This illustration shows the project flow from Draft to Finalize business case.

The next pages contain a list of use cases for the states in part 1 of the project process.



ID	Title	Description	Type	Actor	Start State	End State	Views
001	Add project proposal (draft)	A person has a new idea for the business and decides create a project proposal.	Project	Administrator Steering Committee PMO IT Analyst Finance Executive Stakeholder Business Stakeholder	-	Project - Draft	Project Proposal
002	Submit proposal	After having worked on the project proposal draft for some time, the submitter decides to submit it to be assessed by the IT analysts.	Project	Steering Committee PMO IT Analyst Finance Executive Stakeholder Business Stakeholder Administrator	Project - Draft	Project - Proposed	My Draft Project Proposals
003	Accept proposal as project	Looking at the project proposal, the IT analyst sees that it is a valid proposal that should be investigated further. It is therefore accepted.	Project	IT Analyst	Project - Proposed	Project - Accepted	New Project Proposals
004	Delete project proposal draft	The submitter of the project proposal draft changes their mind and decides to delete the project proposal rather than submitting it.	Project	Steering Committee PMO IT Analyst Finance Executive Stakeholder Business Stakeholder Administrator	Project - Draft	Project - Delete	My Draft Project Proposals
005	Reject proposal	The project proposal will never be accepted, because it is, for example, not in line with the business, it will cost too much to implement, there is no capacity to do it or does not provide enough value in relation to other projects. It is therefore rejected permanently.	Project	Steering Committee IT Analyst	Project - Proposed Project - Ready for approval decision Project - Ready for prio Project - Ready for implementation approval	Project - Rejected	New Project Proposals Value Analysis - Project Proposals Project Business Cases To Approve Projects to Approve for Implementation

The Display > Use Cases view contains information about the views to use for each use case, the state transitions that are involved, and the roles that act in the use case. This view is available for all users. This information is continued on the next page.



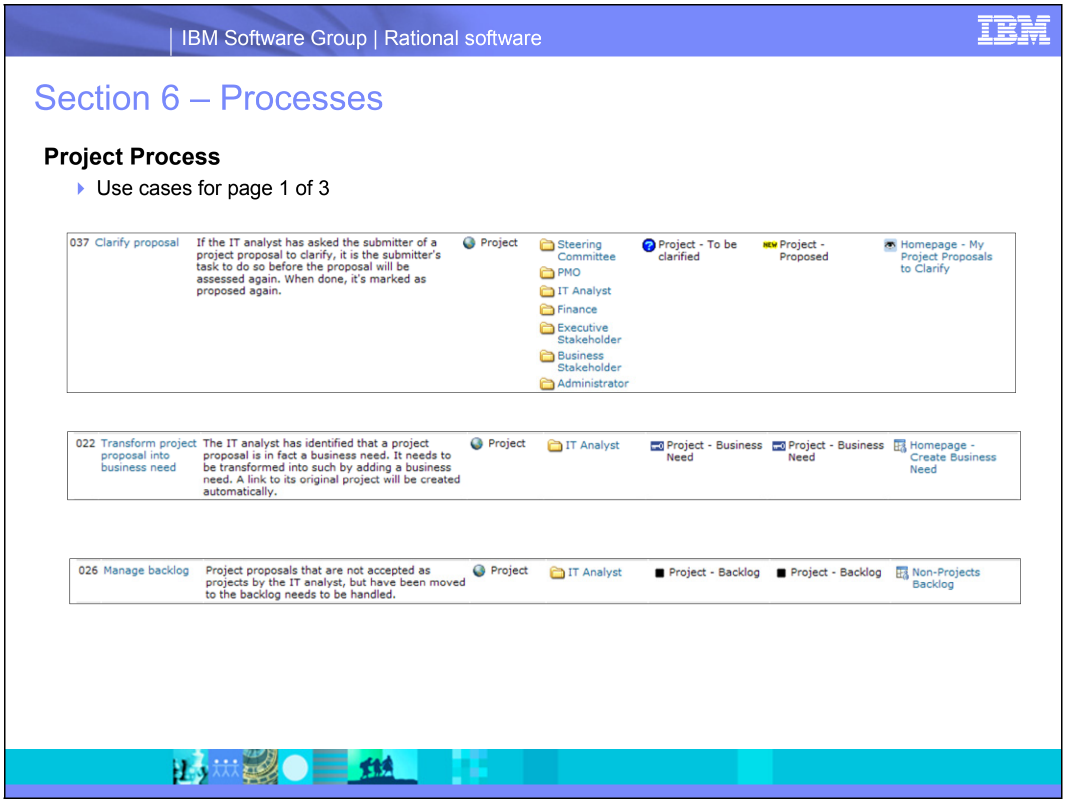
Section 6 – Processes

Project Process

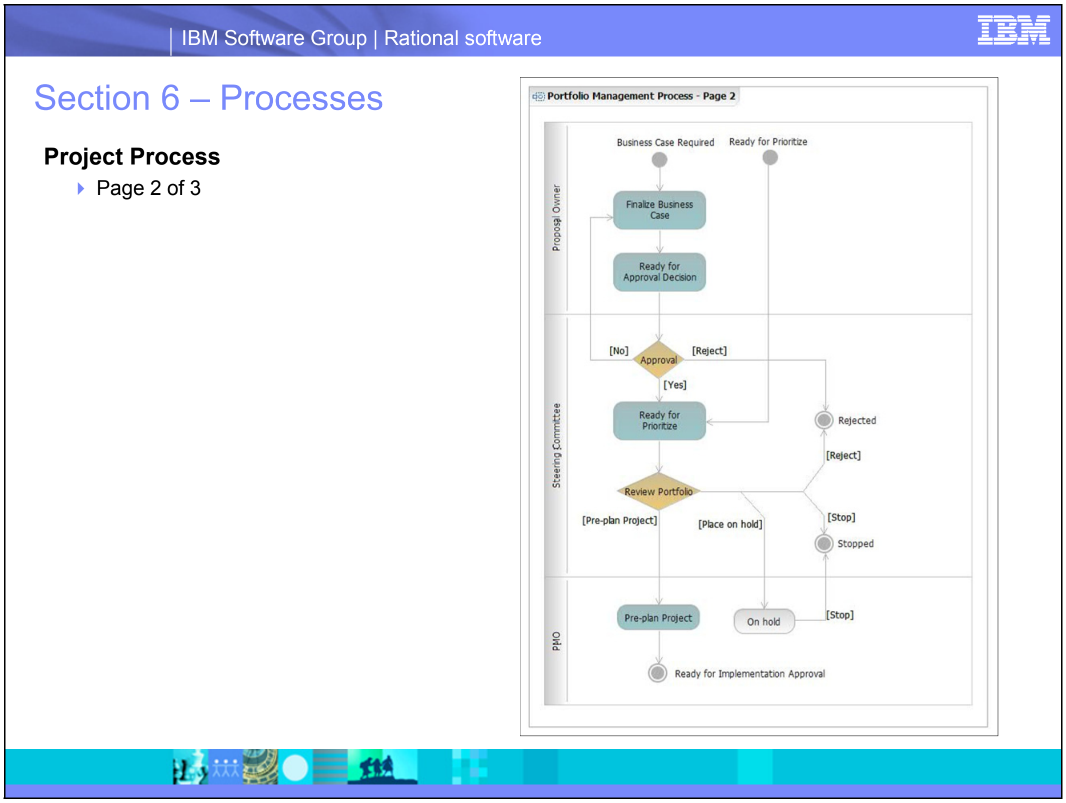
- Use cases for page 1 of 3

006	Mark proposal as duplicate	Looking at the project proposal, the IT analyst sees that it is a duplicate of another project.	Project	IT Analyst	Project - Proposed	Project - Duplicate	New Project Proposals
007	Ask submitter to clarify proposal	Looking at the project proposal, the IT analyst does not fully understand it. It needs to be clarified by the submitter.	Project	IT Analyst	Project - Proposed	Project - To be clarified	New Project Proposals
008	Proposal is business need	After assessing the project proposal the IT analyst sees that it's in fact not a project but a business need against an existing application. The project proposal should be transformed into a business need.	Project	IT Analyst	Project - Proposed	Project - Business Need	New Project Proposals
009	Move proposal to backlog	After assessing the project proposal the IT analyst sees that it's in fact not a project but a defect, support case or other type of object. The project proposal should be moved to the backlog list.	Project	IT Analyst	Project - Proposed	Project - Backlog	New Project Proposals
010	Start initial investigation of project proposal	The accepted project proposal needs to be investigated further. This includes providing estimations.	Project	IT Analyst	Project - Accepted	Project - Under investigation	My Project Proposals To Assess Homepage - My Project Proposals To Assess
011	Project proposal needs business case	After initial investigation and estimation the IT analyst sees that the project proposal needs a business case, for example because the cost will be high or the project long.	Project	IT Analyst	Project - Under investigation	Project - Finalize business case	My Project Proposals To Assess Homepage - My Project Proposals To Assess
012	Project proposal does not need business case	After initial investigation and estimation the IT analyst sees that the project proposal does not need a business case, for example because the cost will be low or the project short. The project proposal can be moved directly to Ready for prio without approval from the steering committee.	Project	IT Analyst	Project - Under investigation	Project - Ready for prio	My Project Proposals To Assess Homepage - My Project Proposals To Assess

The Display > Use Cases view contains information about the views to use for each use case, the state transitions that are involved, and the roles that act in the use case. This view is available for all users.



The Display > Use Cases view contains information about the views to use for each use case, the state transitions that are involved, and the roles that act in the use case. This view is available for all users.



This screen capture is the second of three detailed process illustrations of the project flow in the workspace. This illustration shows the project in the process from Finalize business case to Ready for implementation approval.

The next page contains a list of use cases for the states in part 2 of the project process.

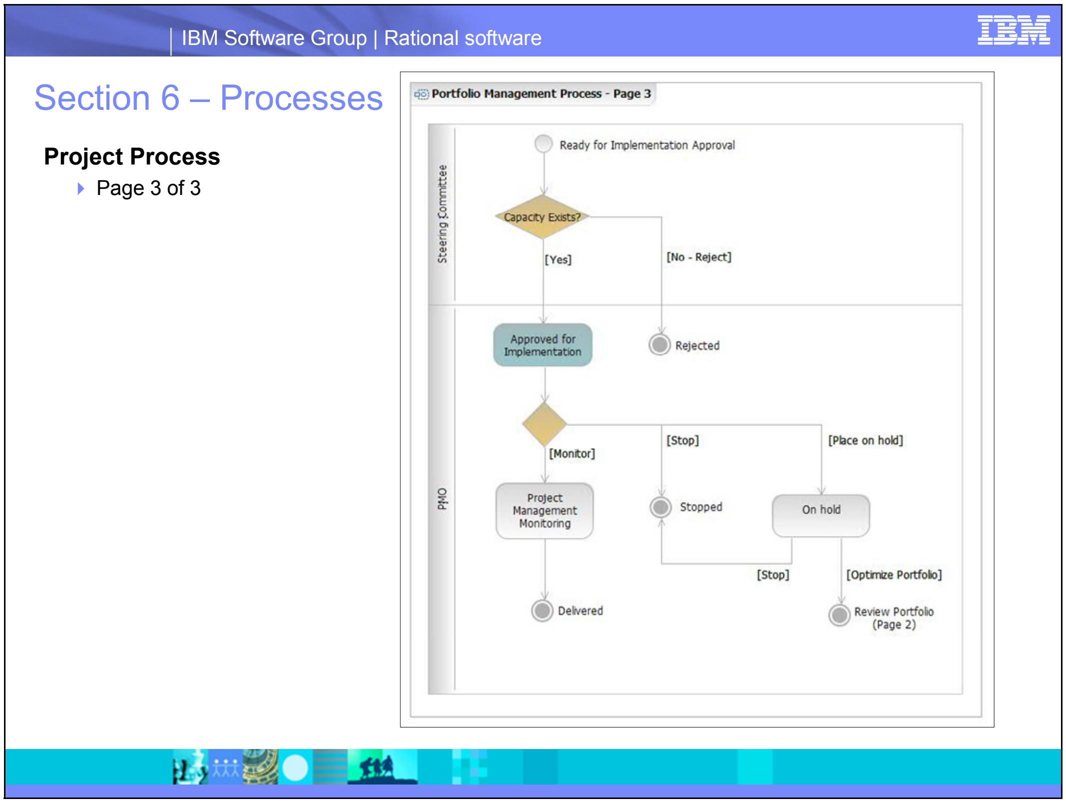
Section 6 – Processes

Project Process

- Use cases for page 2 of 3

013	Create business case for project proposal	The proposal owner of the project proposal creates the business case by describing problem and solution, providing budget numbers, identifying risks and adding business needs as the scope of the project. When done, the proposal needs to be approved by the steering committee before being prioritized.	Project	IT Analyst	Project - Finalize business case	Project - Ready for approval decision	Business Need Create Business Case for Projects
014	Approve project proposal business case	The steering committee reviews all project proposal business cases and approves those of interest.	Project	Steering Committee	Project - Ready for approval decision	Project - Ready for prio	Project Business Cases To Approve
015	Prioritize project proposals	The steering committee gathers for a prioritization session on regular basis, e.g. quarterly, and does pairwise comparisons to find the proposals that provide the most value to the least cost and risk. It is also possible to review the ongoing projects and balance them with the proposals.	Project	Steering Committee	Project - Ready for prio	Project - Pre-plan project	Review Portfolio Strategic Alignment - Projects Value Analysis - Project Proposals
016	Pre-plan project	Projects that scored the highest during the steering committee's prioritization session needs a pre-plan. The PMO (possibly together with the proposal owner) schedules the project's target dates, provides with planned financial numbers and describes the resources demand. Additionally, the business needs (scope) is refined. When the pre-plan is complete, the project needs to be approved by the steering committee.	Project	Proposal Owner PMO	Project - Pre-plan project	Project - Ready for implementation approval	Business Needs Ready to Be Planned Business Need Resource - Demand Project Pre-Planning
017	Approve pre-plan for project	A pre-plan has been created for the project by the PMO. The steering committee now reviews that plan, looks at roadmap and project balances and does capacity analysis.	Project	Steering Committee	Project - Ready for implementation approval	Project - Approved for implementation	Capacity Analysis Project Balance Projects to Approve for Implementation Project Roadmap

The Display > Use Cases view shows information about the views to use for each use case, the state transitions that are involved, and the roles that act in the use case. This view is available for all users.



This screen capture shows the third of three detailed process illustrations of the project flow in the workspace. The illustration shows the project in the process from Ready for implementation approval to Delivered.

The next page contains a list of use cases for the states in part 3 of the project process.

Section 6 – Processes

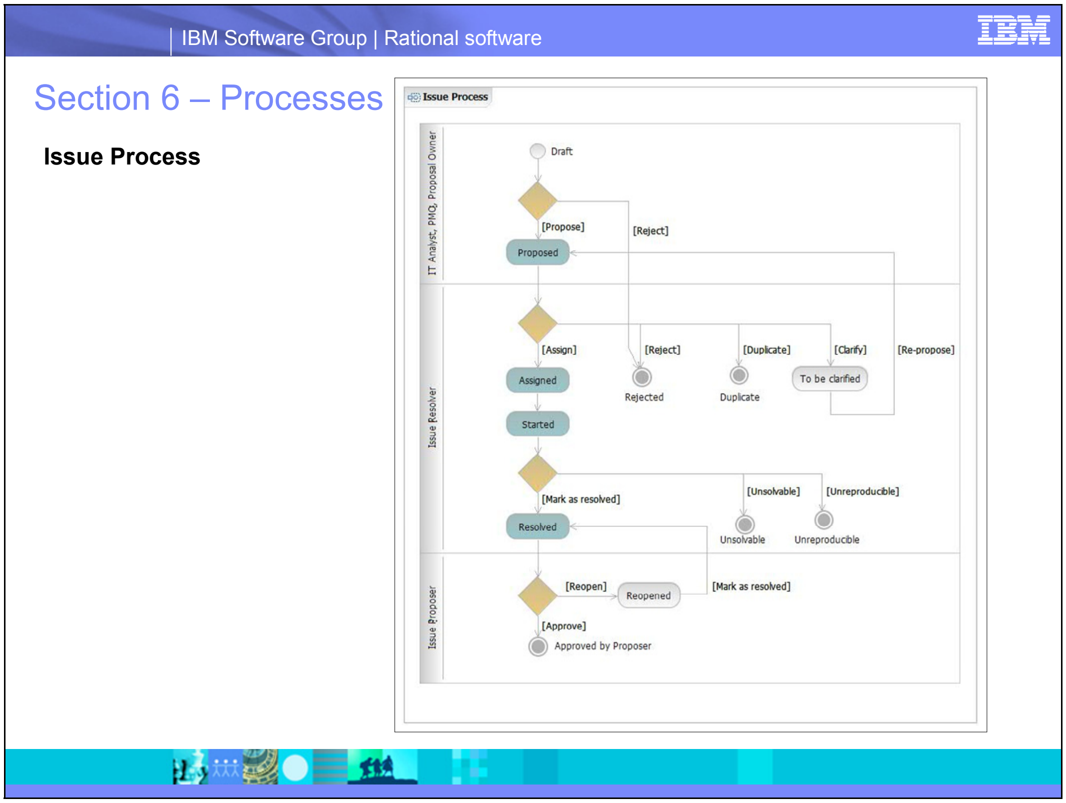
Project Process

- Use cases for page 3 of 3

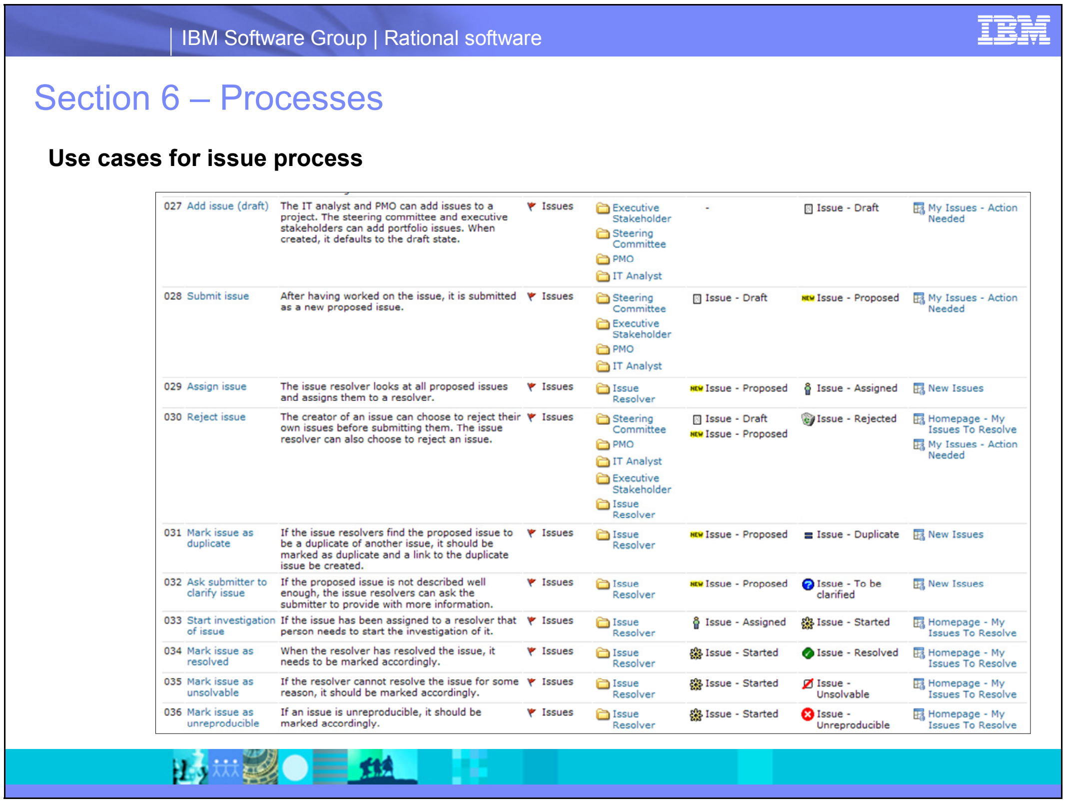
018	Create project in Project Conductor	The steering committee has approved a project for implementation. The PMO creates a project in Rational Project Conductor and hands thus over to project management.	Project	PMO	Project - Approved for implementation		Create Project in Project Conductor
019	Monitor project implementation	The PMO monitors the implementation of the project by looking at planned and actual dates, financial actuals, project thresholds, implementation of business needs (scope) etc.	Project	PMO	Project - Approved for implementation		Business Needs - Planned and Under Impl Projects Under Implementation Homepage - Issue Distribution Ongoing Projects Review Ongoing Projects (r/-)
021	Deliver project	Once the implementation of the project is complete, the project can be delivered.	Project	PMO	Project - Approved for implementation	Project - Delivered	Delivered Projects Projects Under Implementation

023	Stop a project	The steering committee has decided that a project that is under implementation needs to be stopped. The PMO receives a notification about this decision and goes ahead and stops the implementation.	Project	PMO Steering Committee	Project - Approved for implementation	Project - Stopped	Stopped Projects Projects Under Implementation Review Portfolio
024	Place a project on hold	The steering committee has decided that a project that is under implementation needs to be place on hold for the moment. The PMO receives a notification about this decision and goes ahead and stops the implementation.	Project	Steering Committee PMO	Project - Approved for implementation	Project - On hold	Review Portfolio Projects Under Implementation Projects On Hold
025	Restart a project on hold	The steering committee has decided that a project on hold should be restarted. The PMO receives a notification about this decision and goes ahead and restarts the implementation.	Project	Steering Committee PMO	Project - On hold	Project - Approved for implementation	Projects Under Implementation Projects On Hold

The Display > Use Cases view shows information about the views to use for each use case, the state transitions that are involved, and the roles that act in the use case. This view is available for all users.

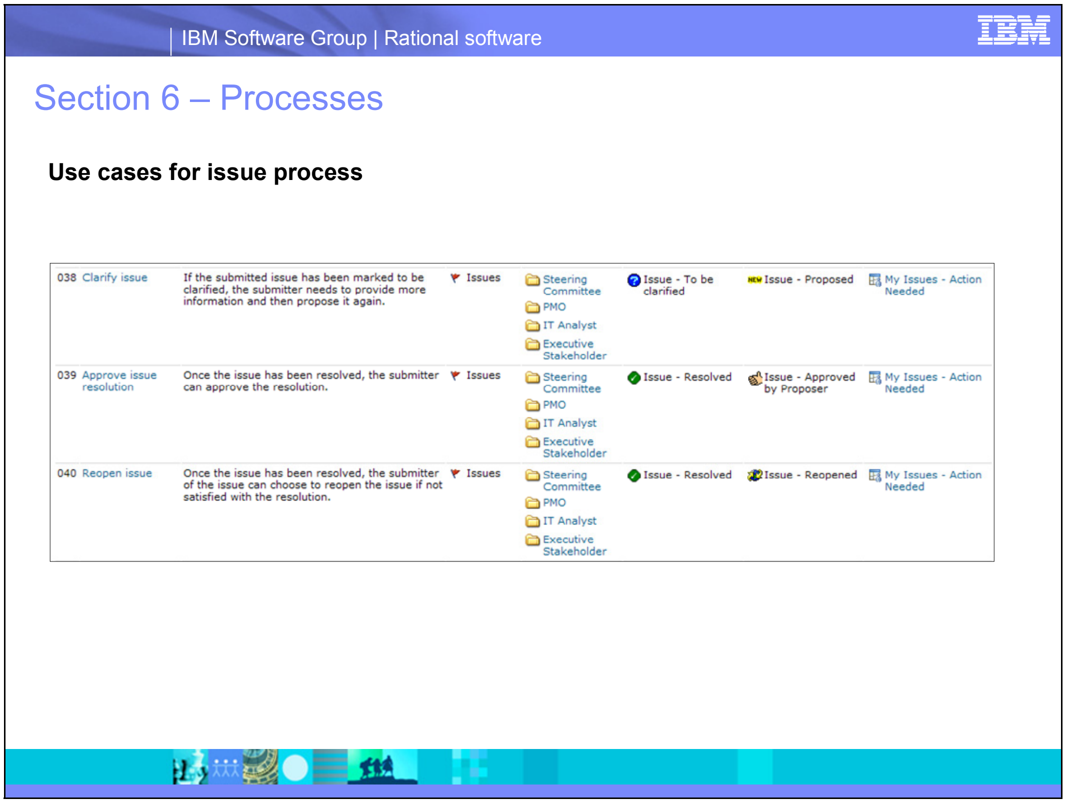


The next page contains a list of the use cases for the states in the issue process.



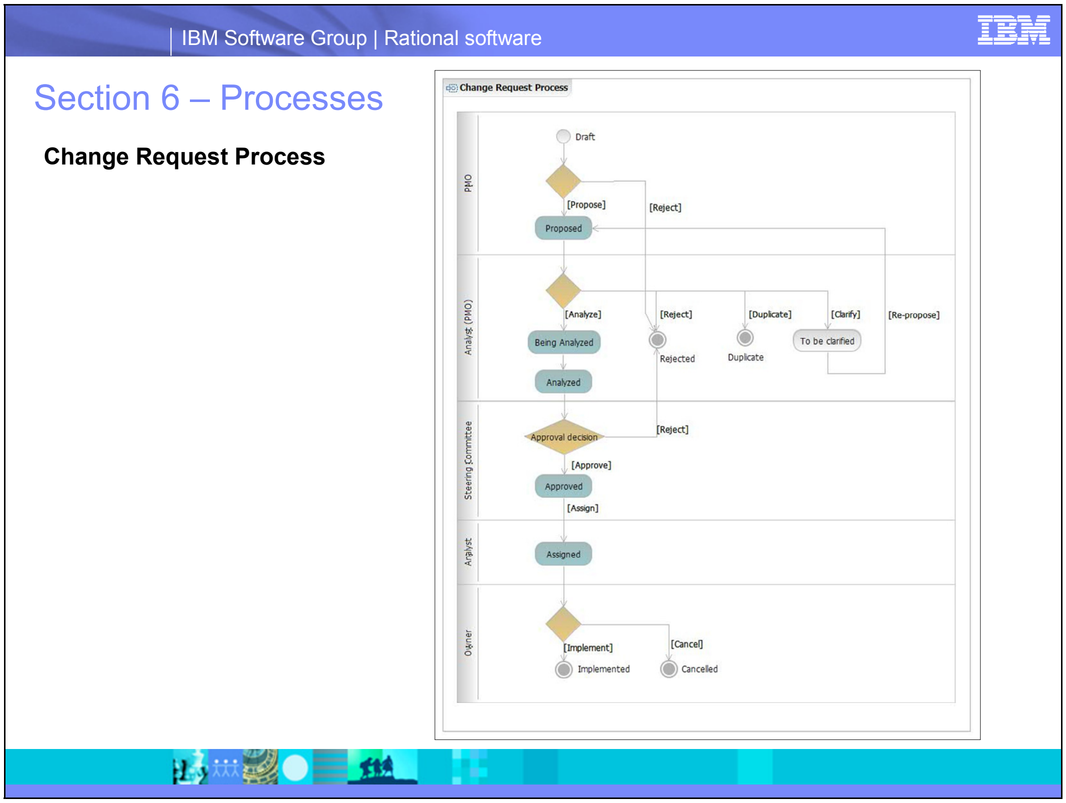
027	Add issue (draft)	The IT analyst and PMO can add issues to a project. The steering committee and executive stakeholders can add portfolio issues. When created, it defaults to the draft state.	Issues	Executive Stakeholder Steering Committee PMO IT Analyst	-	Issue - Draft	My Issues - Action Needed
028	Submit issue	After having worked on the issue, it is submitted as a new proposed issue.	Issues	Steering Committee Executive Stakeholder PMO IT Analyst	Issue - Draft	Issue - Proposed	My Issues - Action Needed
029	Assign issue	The issue resolver looks at all proposed issues and assigns them to a resolver.	Issues	Issue Resolver	Issue - Proposed	Issue - Assigned	New Issues
030	Reject issue	The creator of an issue can choose to reject their own issues before submitting them. The issue resolver can also choose to reject an issue.	Issues	Steering Committee PMO IT Analyst Executive Stakeholder Issue Resolver	Issue - Draft Issue - Proposed	Issue - Rejected	Homepage - My Issues To Resolve My Issues - Action Needed
031	Mark issue as duplicate	If the issue resolvers find the proposed issue to be a duplicate of another issue, it should be marked as duplicate and a link to the duplicate issue be created.	Issues	Issue Resolver	Issue - Proposed	Issue - Duplicate	New Issues
032	Ask submitter to clarify issue	If the proposed issue is not described well enough, the issue resolvers can ask the submitter to provide with more information.	Issues	Issue Resolver	Issue - Proposed	Issue - To be clarified	New Issues
033	Start investigation of issue	If the issue has been assigned to a resolver that person needs to start the investigation of it.	Issues	Issue Resolver	Issue - Assigned	Issue - Started	Homepage - My Issues To Resolve
034	Mark issue as resolved	When the resolver has resolved the issue, it needs to be marked accordingly.	Issues	Issue Resolver	Issue - Started	Issue - Resolved	Homepage - My Issues To Resolve
035	Mark issue as unsolvable	If the resolver cannot resolve the issue for some reason, it should be marked accordingly.	Issues	Issue Resolver	Issue - Started	Issue - Unsolvable	Homepage - My Issues To Resolve
036	Mark issue as unreproducible	If an issue is unreproducible, it should be marked accordingly.	Issues	Issue Resolver	Issue - Started	Issue - Unreproducible	Homepage - My Issues To Resolve

The Display > Use Cases view shows information about the views to use for each use case, the state transitions that are involved, and the roles that act in the use case. This view is available for all users.



038	Clarify issue	If the submitted issue has been marked to be clarified, the submitter needs to provide more information and then propose it again.	Issues	Steering Committee PMO IT Analyst Executive Stakeholder	Issue - To be clarified	Issue - Proposed	My Issues - Action Needed
039	Approve issue resolution	Once the issue has been resolved, the submitter can approve the resolution.	Issues	Steering Committee PMO IT Analyst Executive Stakeholder	Issue - Resolved	Issue - Approved by Proposer	My Issues - Action Needed
040	Reopen issue	Once the issue has been resolved, the submitter of the issue can choose to reopen the issue if not satisfied with the resolution.	Issues	Steering Committee PMO IT Analyst Executive Stakeholder	Issue - Resolved	Issue - Reopened	My Issues - Action Needed

The Display > Use Cases view shows information about the views to use for each use case, the state transitions that are involved, and the roles that act in the use case. This view is available for all users.



The next page contains a list of use cases for the states in the change request process.

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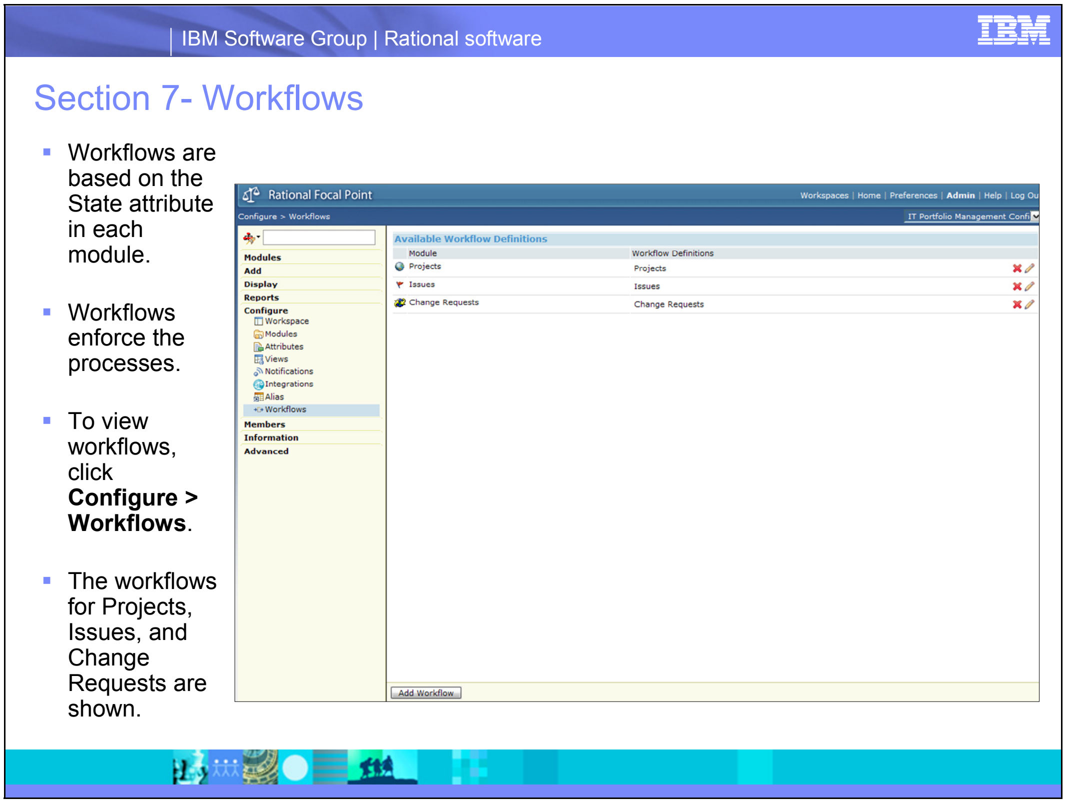
Section 6 – Processes

Use cases for change request process

041	Add change request (draft)	As the project is under implementation, change requests can be raised against it.	Change Requests	PMO	-	Change Request - Draft	Change Request
042	Submit change request	After having worked on the change request draft for some time, the submitter decides to submit it.	Change Requests	PMO	Change Request - Draft	Change Request - Proposed	Proposed Change Requests
043	Reject change request	The creator of a change request can choose to reject it before submitting it. It is also possible for the analyzer of the change request as well as the steering committee to reject a change request if it does not make sense to go through with.	Change Requests	Steering Committee PMO	Change Request - Draft Change Request - Proposed Change Request - Analyzed	Change Request - Rejected	Change Requests to Approve My Change Requests - Action Needed Proposed Change Requests
044	Mark change request as duplicate	If the PMO finds the proposed change request to be a duplicate of another change request, it should be marked as duplicate and a link to the duplicate change request be created.	Change Requests	PMO	Change Request - Proposed	Change Request - Duplicate	Proposed Change Requests
045	Ask submitter to clarify change request	If the proposed change request is not described well enough, the PMO can ask the submitter to provide with more information.	Change Requests	PMO	Change Request - Proposed	Change Request - To be clarified	Proposed Change Requests
046	Clarify change request	If the submitted change request has been marked to be clarified, the submitter needs to provide more information and then propose it again.	Change Requests	PMO	Change Request - To be clarified	Change Request - Proposed	My Change Requests - Action Needed
047	Start analysis of change request	A PMO member will be in charge for analyzing the proposed change request.	Change Requests	PMO	Change Request - Proposed	Change Request - Being Analyzed	Homepage - My Change Requests to Analyze an Assign
048	Finalize change request analysis	A PMO member will be in charge for analyzing the proposed change request. When done, it needs approval from steering committee.	Change Requests	PMO	Change Request - Being Analyzed	Change Request - Analyzed	Homepage - My Change Requests to Analyze an Assign
049	Approve change request	The steering committee reviews proposed and analyzed change requests and can decide to approve them.	Change Requests	Steering Committee	Change Request - Analyzed	Change Request - Approved	Change Requests to Approve
050	Assign change request	Once the change request has been approved by the steering committee, the PMO will assign it to a person (any member) who will make sure that it's handled.	Change Requests	PMO	Change Request - Approved	Change Request - Assigned	Homepage - My Change Requests to Analyze an Assign
051	Handle change request	The PMO has assinged the change request to a person who is now responsible for handling it.	Change Requests	Steering Committee PMO Administrator IT Analyst Executive Stakeholder Business Stakeholder Finance	Change Request - Assigned	Change Request - Assigned	Homepage - My Change Requests to Handle

The Display > Use Cases view shows information about the views to use for each use case, the state transitions that are involved, and the roles that act in the use case. This view is available for all users.

Section 7 - Workflows



The workflow is set up for three modules: Projects, Issues, and Change Requests. The workflow is based on the State attribute in each module.

The workflow has two purposes:

1. Enforce the process of moving a project, issue, or change request from one state to another where only certain defined transitions are allowed.
2. Control which attributes are editable, visible but not editable, or hidden for each state, and which attributes are editable or visible during a transition from one state to another.

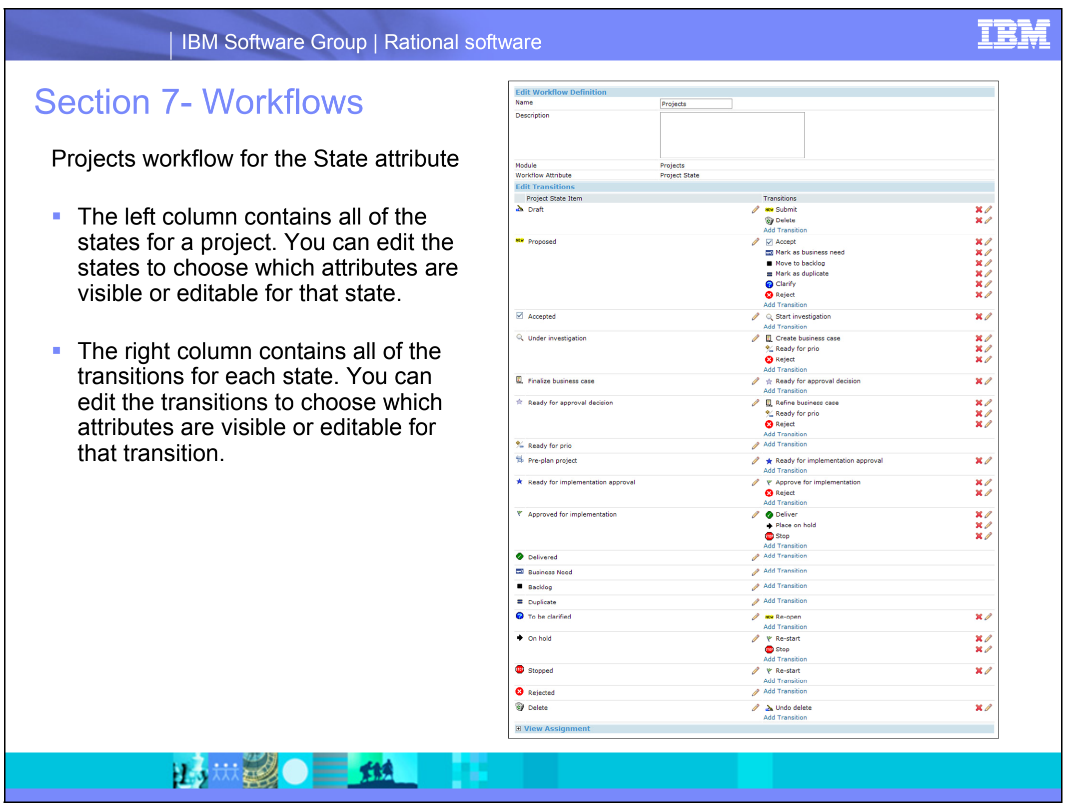
The workflow feature is related to the views and roles in the workspace. By applying a workflow to a view and assigning it to a certain role, you can control what users with a certain role are allowed to do in regard to state transfer. Some, but not all of the views that are based on the Projects, Issues, or Change Requests modules use workflow. Views that do not use the workflow work normally: attributes can be editable, visible, or hidden according to the access level that is defined for that view. For views that use the workflow both the access level for the view and the access level of the workflow affect what the user can see and do.

In the IT portfolio management configuration add-on workspace, the following principles apply:

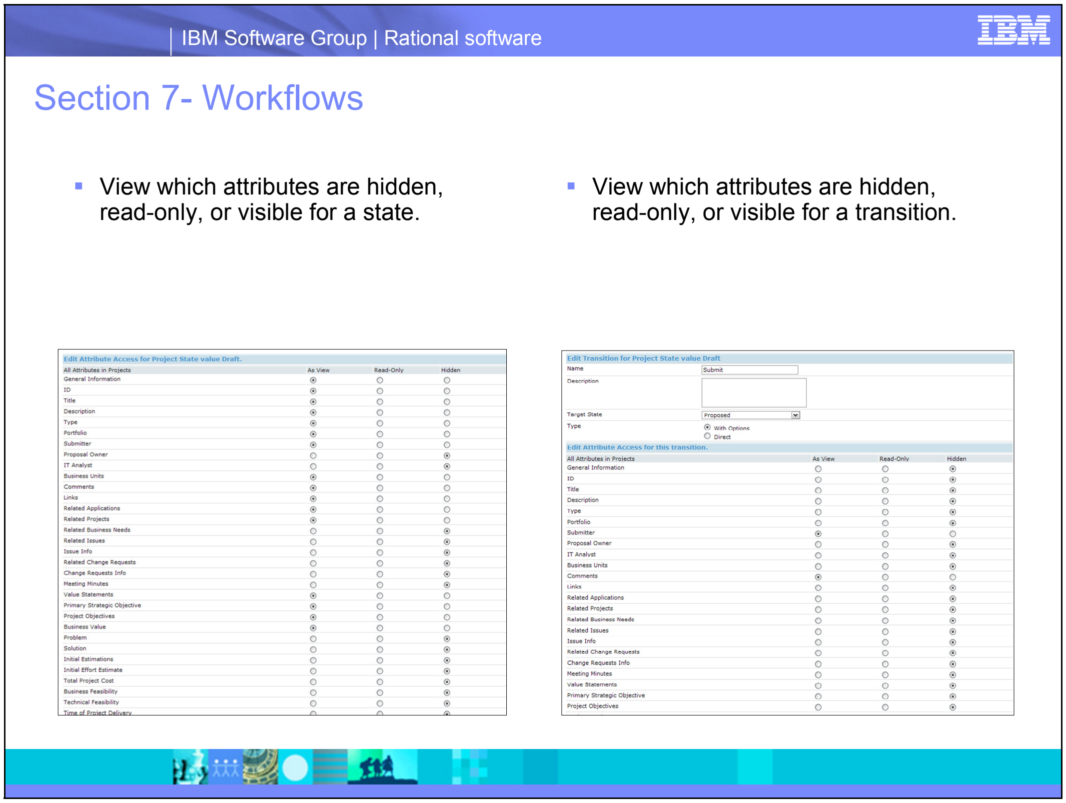
- In views that are not used for transitions, the State attribute is set to Visible (that is, read-only). The workflow is not applied on such views.
- In views that are used for transitions, all attributes are editable or visible. The descriptions of these views contain the note “Workflow applied”. The access rights on each attribute are defined in the workflow definition. Some exceptions exist.

Adding new attributes: When you add a new attribute to the Projects, Issues, or Change Requests modules, you must first update all views based on these modules to set up the attribute access. Because several views, especially for projects, have a workflow applied, you also must update the attribute access rights in workflow definition.

By default, a new attribute is set to be editable, so you must edit each state in the workflow, set the access rights for the new attribute, and save your changes. However, you do not need to update the transitions.



Although the Ready for prio state is not an end state, transitions are not defined for that state because the transition to Pre-plan project is done in a Visualize view (after the projects are prioritized), and workflow transitions can only be done in Display views.

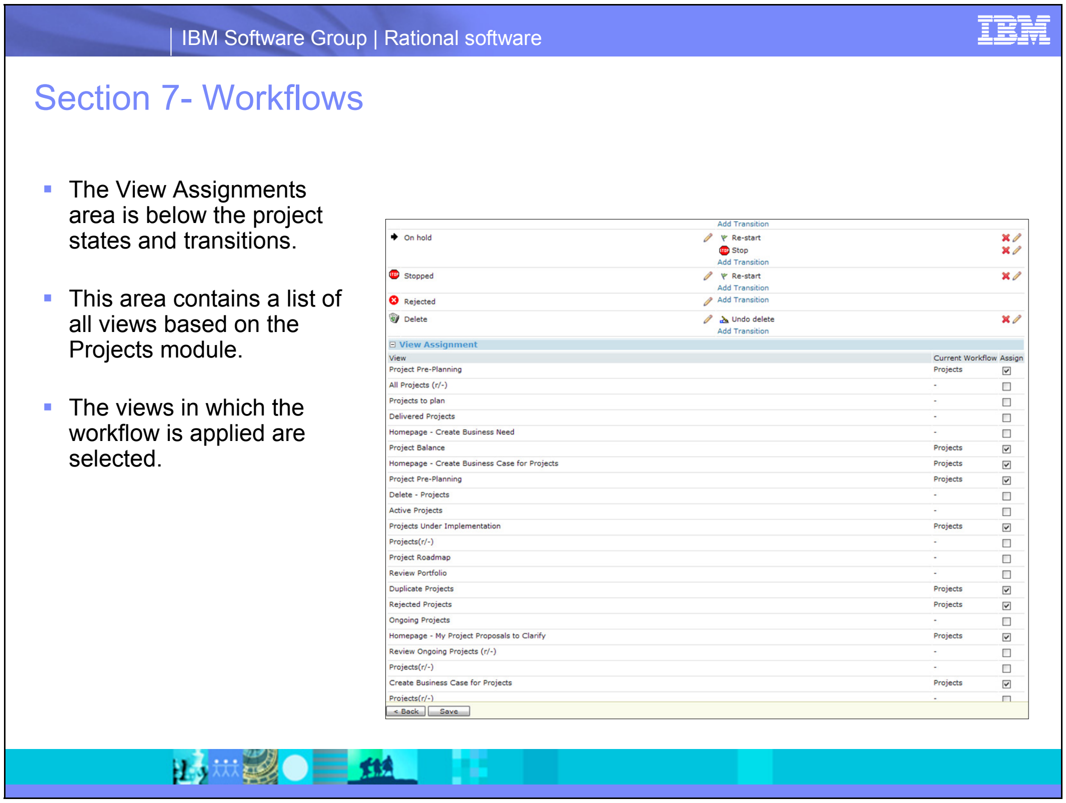


In the image on the left, you can see the workflow setup on the attribute level for the Draft state for a project. For a project that is in Draft state, the settings are as follows:

- If As View is set for an attribute, the attribute is visible and editable for views that have the workflow applied.
- If Read-Only is set for an attribute, the attribute is visible but not editable for views that have the workflow applied.
- If Hidden is set for an attribute, the attribute is not visible for views that have the workflow applied.

In the image on the right, you can see the workflow setup on a Submit transition for the Draft state for a project. For a project in the Submit transition, the settings are as follows:

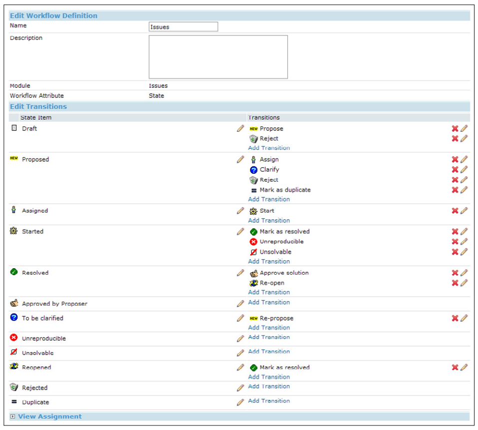
- If As View is set for an attribute, the attribute is visible and editable for views that have the workflow applied.
- If Read-Only is set for an attribute, the attribute is visible but not editable for views that have the workflow applied.
- If Hidden is set for an attribute, the attribute is not visible for views that have the workflow applied.



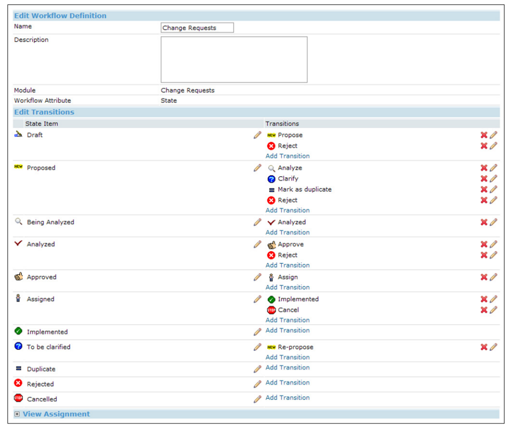
You can also assign a workflow to a view from Configure > Views > View Definition. At the bottom of the final view definition set up page, select the workflow from the drop-down list.

Section 7- Workflows

- Issue workflow

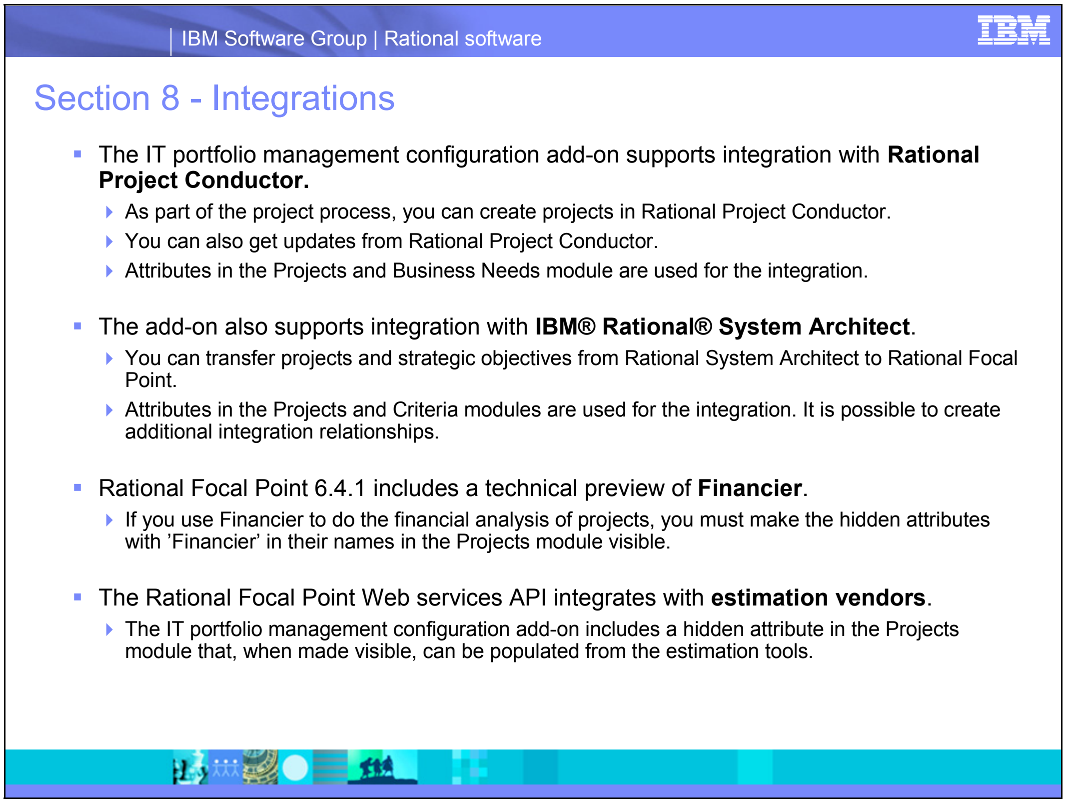


- Change request workflow

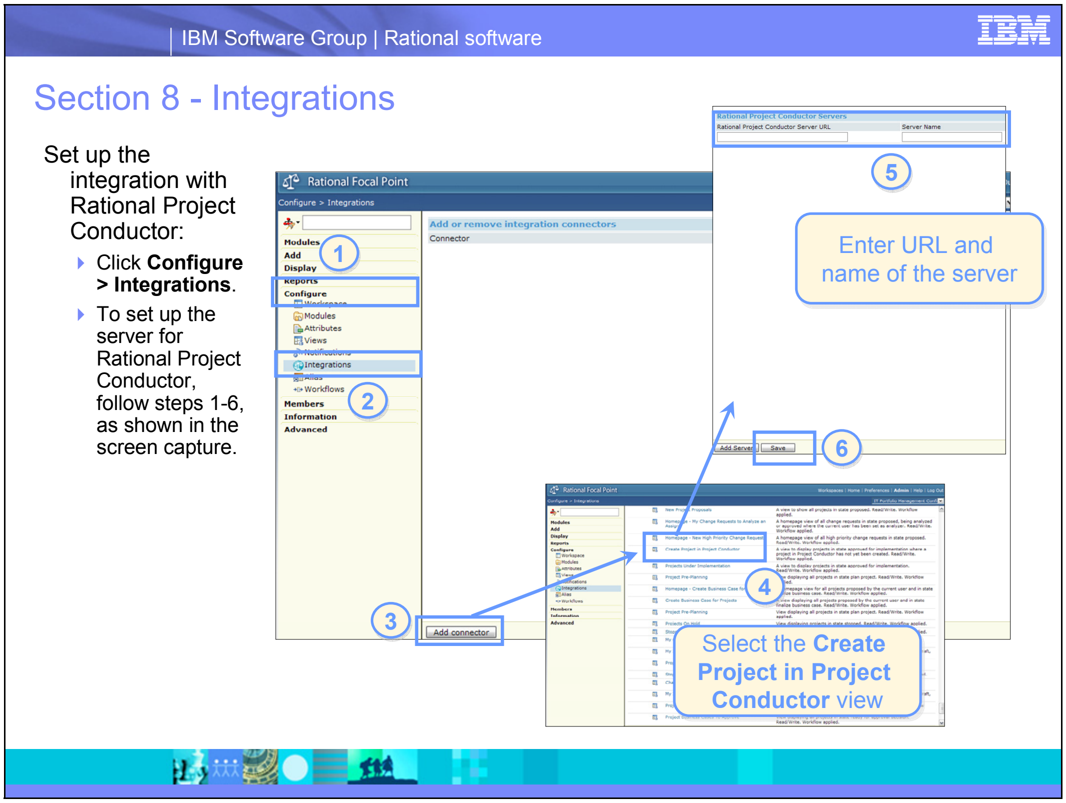


These screen captures show the workflow definitions for the issue and change request State attributes.

Section 8 - Integrations



The following pages provide more information about each of the integration possibilities.



1. Click **Configure**.
2. Click **Integrations**.
3. Click **Add connector**.
4. Select the **Create Project in Project Conductor** view.
5. Enter URL and name of the server.
6. Click **Save**.

Set up a connector for each Rational Project Conductor server that you want to integrate with. When users create projects, they can select which server the project is created on.

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Section 8 - Integrations

Integrating with **Rational Project Conductor**

- When you create a project, the following Rational Focal Point attributes move to Rational Project Conductor:

Module	Rational Focal Point	Rational Project Conductor
Project	Title	Name
Project	Description	Description
Project	Target Start Date	Proposed Start
Project	Target End Date	Proposed Finish
Project	Business needs	Summary tasks
Business Need	Title	Name
Business Need	Target Start Date	Proposed Start
Business Need	Target End Date	Proposed Finish
Business Need	Estimated Man Hours	Effort

- Also, links to the project in Rational Project Conductor are created:
  - For users, the Link to Project in Project Conductor attribute for a project in Rational Focal Point contains the visible and clickable link to the project.
  - A similar link is in the Link to Business Need in Project Conductor attribute for a business need in Rational Focal Point, but this link is for business needs.
  - The Implementation Project URI attribute in the Projects module contains the integration connector link, which is mandatory for the integration. This attribute is hidden from users, and the link does not direct you to the project in Rational Project Conductor.

The IT portfolio management configuration add-on uses most of the supported attributes in the integration. To read more about the integration, go to http://jazz.net/library/article/351.

Note: After a project is created, you cannot update these values in Rational Project Conductor from Rational Focal Point.

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Section 8 - Integrations

Integrating with **Rational Project Conductor**

- When you update a project, the following Rational Focal Point attributes are updated with data from Rational Project Conductor:

Module	Focal Point	Rational Project Conductor
Project	Total Planned Man Hours	Planned Effort
Project	Total Actual Man Hours	Actual Work
Project	Planned Start Date	Planned Start
Project	Actual Start Date	Actual Start
Project	Planned End Date	Planned Finish
Project	Actual End Date	Actual Finish
Project	Implementation State	State
Project	Completeness (%)	Percent Complete

Module	Focal Point	Rational Project Conductor
Business Need	Planned Man Hours	Planned Effort
Business Need	Actual Man Hours	Actual Work
Business Need	Planned Start Date	Planned Start
Business Need	Actual Start Date	Actual Start
Business Need	Planned End Date	Planned Finish
Business Need	Actual End Date	Actual Finish
Business Need	Completeness (%)	Percent Complete

In the Projects module, the Total Planned Man Hours and Total Actual Man Hours attributes contain the following default business rules:

- =LinkListAttributeSum("Business Needs","Planned Man Hours","listen_to=Planned Man Hours",'Business Needs')
- =LinkListAttributeSum("Business Needs","Actual Man Hours","listen_to=Actual Man Hours",'Business Needs')

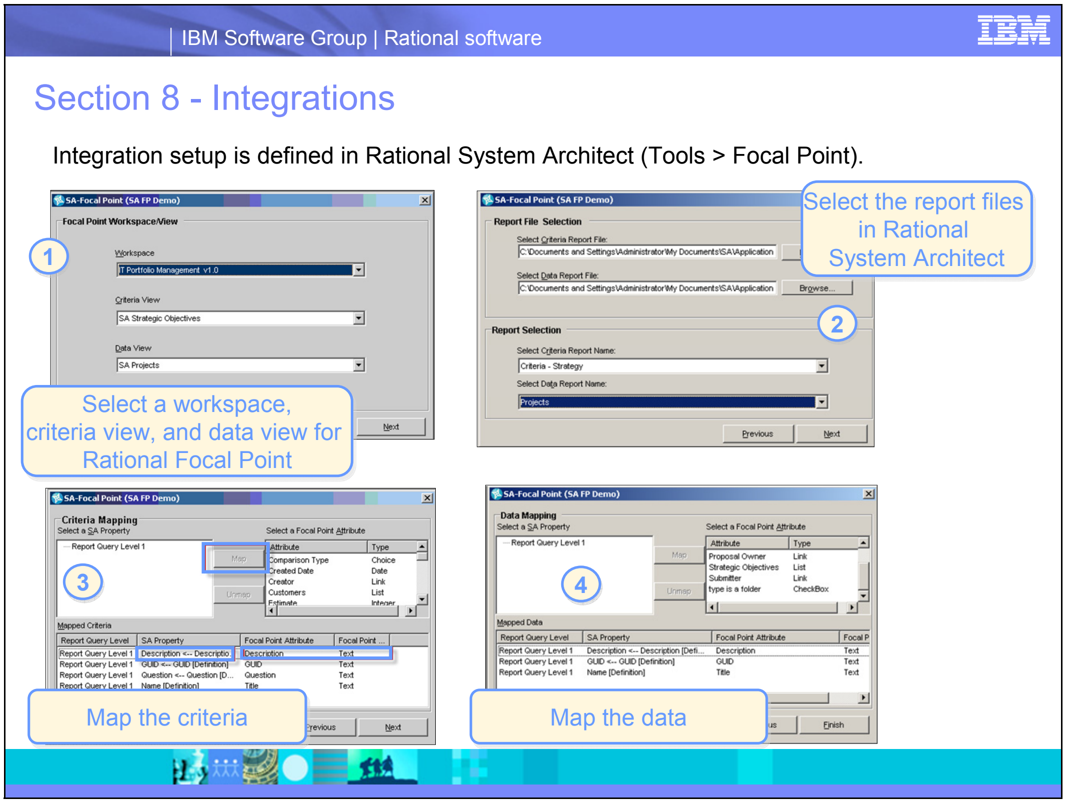
These business rules sum the Planned Man Hours and Actual Man Hours for the business needs up to the project level. When updates are made from Rational Project Conductor, these values are overwritten with the corresponding project level values in Rational Project Conductor. The values are overwritten because the effort for a project in Rational Project Conductor can be more than the sum of its summary tasks that were transferred from Rational Focal Point in the form of business needs. Other tasks, defects, or issues might be included in the project effort calculation in Rational Project Conductor.

If you want to keep the business rules when you use the integration, in the Projects module, remove the alias for these two attributes so that these values are not updated from Rational Project Conductor, but calculated in Rational Focal Point.

Section 8 - Integrations

Integrating with **Rational System Architect**

- The integration with Rational System Architect is set up in Rational System Architect.
- To move data, use three attributes in Rational Focal Point: Title, Description, and GUID.
- The IT Portfolio Management Configuration Add On comes with the following attributes that are set up to support the Rational System Architect integration:
  - Projects module
    - Title
    - Description
    - GUID (hidden)
  - Criteria module
    - Title
    - Description
    - GUID (hidden)
  - Applications module
    - Title
    - Description
    - GUID (hidden)
- To integrate entities other than projects, add a GUID attribute (Type Text) in the module.
- Specify which views to use for the integration. There are three pre-defined views in Configure > Views > All Members/System Views > Integration Views that can be used for this purpose:
  - Create Projects in FP from SA
  - Create Criteria in FP from SA
  - Create Applications in FP from SA



1. Select a workspace, criteria view, and data view for Rational Focal Point.
2. Select the report files in Rational System Architect.
3. Map the criteria.
4. Map the data.

After you set up the integration, you can move any information from Rational System Architect to analyze in Rational Focal Point; for example, compare projects against strategic objectives.

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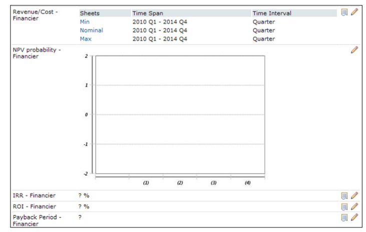
Section 8 - Integrations

- Rational Focal Point 6.4.1 comes with a technical preview of the Financier feature.
- If a customer wants to use Financier to do financial analysis, the following hidden attributes in the IT portfolio management configuration add-on must be made visible. The attributes are in the Financial Information section of the Projects module.
  - Revenue/Cost – Financier (Time Grid)
  - NPV probability – Financier (Matrix)
  - IRR – Financier (Float)
  - ROI – Financier (Integer)
  - Payback Period – Financier (Integer)

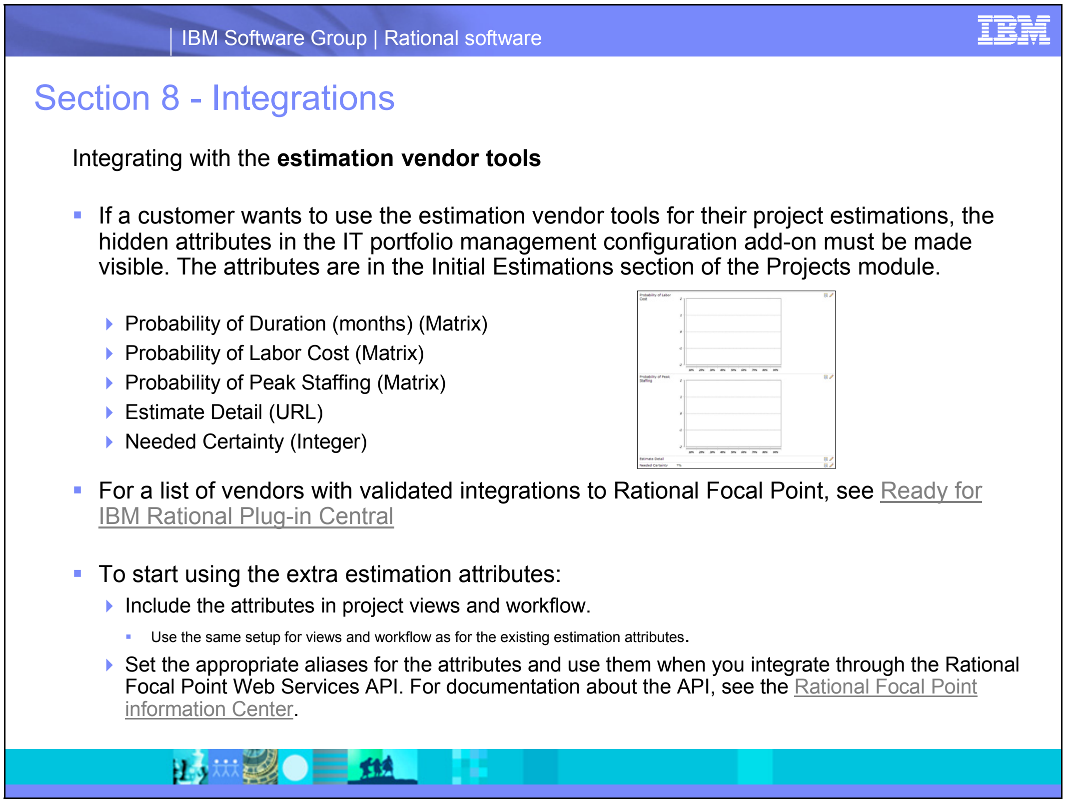


- To start using Financier and the attributes:
  - Include the attributes in project views and workflows.
    - Use the same setup for views and workflow as for the existing financial attributes.
    - The appropriate Web services aliases are already set.
  - Remove duplicate financial attributes that are no longer needed; for example, NPV, IRR, and ROI.
- For documentation about Financier, see the IBM Rational Focal Point Information Center.

The Web services aliases are:

- NPV probability – Financier: FINANCIER__NPV
- IRR – Financier: FINANCIER__IRR
- ROI – Financier: FINANCIER__ROI
- Payback Period – Financier: FINANCIER__ paybackPeriod

IBM Rational Focal Point Information Center



You can also set up integration for other attributes in the workspace. For example, you might want to estimate business needs.

To assess whether a project should be created, it is important to understand the amount of time and effort required (with the assumption that the effort hours of the team is the major factor in how much will it cost). You can use the estimation tools to consider these factors. The estimation tools provide more than a number; they provide a probability distribution. For example, there is a 20% chance that the project will take 14 months or less, but there is a 90% chance that it will be done within 32 months.

The estimation tools can also provide multiple estimates based on peak team size. For example, if X many people work on the project, how long it will take to complete? If Y more people are added, how will the schedule change?

By using the estimation tools, the steering committee can better understand the cost of the project and the uncertainty associated with the cost. The relationship between team size and duration is not simple; doubling the team size does not halve the duration.

You can use the estimation tools to make multiple estimates that are difficult to compute manually. The estimation tools transfer multiple estimates for a given project into the Probability matrixes in the workspace, with each estimate being a probability distribution of duration, labor cost, and peak staffing.

[IBM Rational Plug-in Central]

[IBM Rational Focal Point Information Center]

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Section 8 – Integrations

Integrating with the **estimation vendor tools**

- The estimation suite that integrates with the Rational Focal Point configuration for IT Portfolio Management might be used by various roles:
  - The Proposal Owner, when they create business cases
  - The Steering Committee, when it makes prioritizations and approves proposals
  - The PMO, when it pre-plans the project
- With the estimation suite integration, you can complete these tasks:
  - Create a detailed estimate as part of a business plan by using the following input from Rational Focal Point:
    - Constraints on schedule and cost from the Initial Estimate attributes
    - Business needs, which can indicate the scope and size of the project
  - Include multiple estimates in business cases, which the Steering Committee can use to assess the feasibility of the project for prioritization and approval. These estimates can be used to assess tradeoffs of schedule, cost, and quality levels, and the risk and uncertainty associated with those tradeoffs.
  - When the PMO completes the pre-plan for an approved project, depending on the estimate, you can view schedule information and the number of the resources needed by type.
- For details, see the documentation for your estimation suite.

Section 9 – Dependencies and Groups

Section 9 – Dependencies and Groups

- Attribute management and maintenance
  - To scale down the IT portfolio management configuration add-on workspace by removing configuration areas or to tailor the workspace to your needs, you must understand the dependencies between attributes and their relationships to criteria and views.
- To customize the workspace, use two supporting modules: Attributes and Attribute Groups.
  - The Attributes module contains a list of the attributes in the workspace that have dependencies to other attributes, criteria, or views. Those dependencies are shown for each attribute. The attributes are listed in the same order as they are in the module.
  - The Attribute Groups module contains a list of the groups of attributes. Use this list to understand how certain attributes have direct dependencies and belong to chains of dependencies. The groups represent these chains.
- Whenever you add, change, or remove attributes that have dependencies, update the information in these modules.
- The Administrator can access the views that display the content of the modules:
  - Display > Attributes (r/w)
  - Display > Attribute Groups (r/w)

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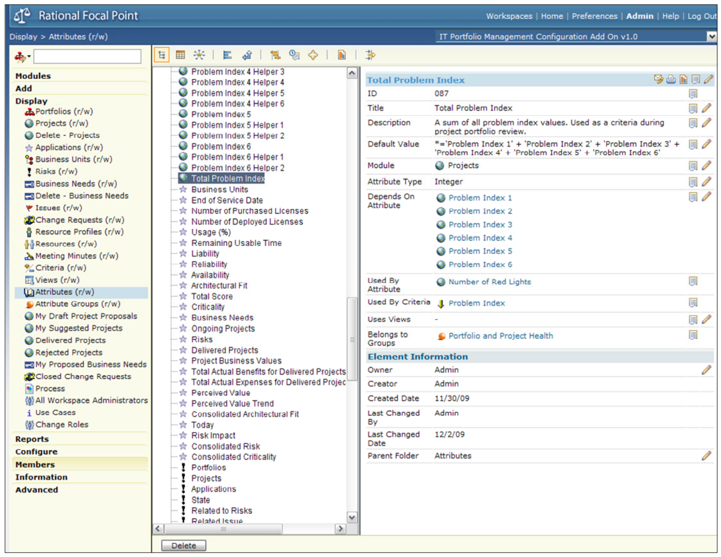
Section 9 – Dependencies and Groups

- You must be an administrator to view attributes. To view attributes, click **Display > Attributes (r/w)**.
- **Note**: Only the attributes that have dependencies are listed.
- For each attribute, you can see the following information (see example on next slide):
  - Title – The name of the attribute
  - Description – The description of the attribute, as defined in Configure > Attributes > [*Module*]
  - Default Value – The default value for the attribute, if any, as defined in Configure > Attributes > [*Module*]
  - Module – The module in which the attribute exists
  - Attribute Type – The type of the attribute
  - Depends on Attribute – A list of attributes that the attribute depends on to show its value
  - Used By Attribute – A list of attributes that uses the attribute to show its value
  - Used by Criteria – A list of criteria that uses the attribute as the estimate. Only for Integer attributes.
  - Uses Views – A list of views that the attribute uses to show its value. Only for Link, List Link or Incoming Links attributes.
  - Belongs to Groups – A list of attribute groups that the attribute belongs to

Section 9 – Dependencies and Groups

- To view attributes, click **Display > Attributes (r/w).**
- The screen capture shows an attribute, Total Problem Index, in the workspace.
- The attribute has an expression as its default value, exists in the Products module, and is of the type Integer. It depends on six attributes, is referred to in one attribute, and it is used as the estimate for one criterion. It belongs to the Portfolio and Project Health group.



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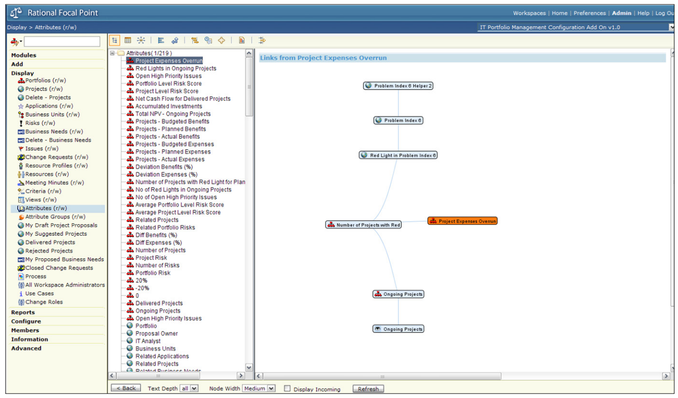
Section 9 – Dependencies and Groups

- To see the chain of dependencies for attributes:

1. Right-click the tree.
2. Click **Display Links**.
   - A relational graph opens.
3. Click **Text Depth – All**.
   - The dependencies of the attributes are shown.
4. To see the details of an attribute, click the attribute.
5. To see the direct dependencies of an attribute, hover the cursor over the attribute.

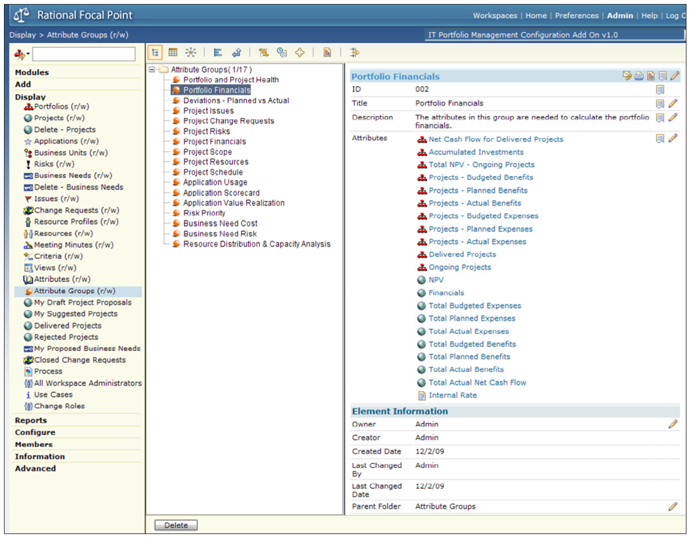


- Use this information to understand what you might need to change when you update attributes.

You can display all of the attributes and their dependencies, but displaying all of that information might result in a cluttered chart. To display all of the attributes and their dependencies, use the Relational Graph mode instead of the Tree. Use filters to display specific information.

Section 9 – Dependencies and Groups

- To view attribute groups, click **Display > Attribute Groups (r/w)**.
- Each group contains a list of attributes that are included in the group.
- To update or remove an attribute or a set of attributes in the workspace, ensure that the group in which the attributes is included is updated correctly.



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More information

Contacting IBM Rational Software Support

If the self-help resources have not provided a resolution to your problem, you can contact IBM® Rational® Software Support for assistance in resolving product issues.

Note If you are a heritage Telelogic customer, a single reference site for all support resources is located at http://www.ibm.com/software/rational/support/telelogic/

Prerequisites

To submit your problem to IBM Rational Software Support, you must have an active Passport Advantage® software maintenance agreement. Passport Advantage is the IBM comprehensive software licensing and software maintenance (product upgrades and technical support) offering. You can enroll online in Passport Advantage from http://www.ibm.com/software/lotus/passportadvantage/howtoenroll.html

•To learn more about Passport Advantage, visit the Passport Advantage FAQs at http://www.ibm.com/software/lotus/passportadvantage/brochures_faqs_quickguides.html.

•For further assistance, contact your IBM representative.

To submit your problem online (from the IBM Web site) to IBM Rational Software Support, you must additionally:

•Be a registered user on the IBM Rational Software Support Web site. For details about registering, go to http://www.ibm.com/software/support/.

•Be listed as an authorized caller in the service request tool.

Submitting problems

To submit your problem to IBM Rational Software Support:

1. Determine the business impact of your problem. When you report a problem to IBM, you are asked to supply a severity level. Therefore, you need to understand and assess the business impact of the problem that you are reporting.

Use the following table to determine the severity level:

Severity	Description
1	The problem has a *critical* business impact: You are unable to use the program, resulting in a critical impact on operations. This condition requires an immediate solution.
2	This problem has a *significant* business impact: The program is usable, but it is severely limited.
3	The problem has *some* business impact: The program is usable, but less significant features (not critical to operations) are unavailable.
4	The problem has *minimal* business impact: The problem causes little impact on operations or a reasonable circumvention to the problem was

implemented.

2. Describe your problem and gather background information, When describing a problem to IBM, be as specific as possible. Include all relevant background information so that IBM Rational Software Support specialists can help you solve the problem efficiently. To save time, know the answers to these questions:

•What software versions were you running when the problem occurred?

To determine the exact product name and version, use the option applicable to you:

•Start the IBM Installation Manager and select **File** > **View Installed Packages**. Expand a package group and select a package to see the package name and version number.

•Start your product, and click **Help** > **About** to see the offering name and version number.

•What is your operating system and version number (including any service packs or patches)?

•Do you have logs, traces, and messages that are related to the problem symptoms?

•Can you recreate the problem? If so, what steps do you perform to recreate the problem?

•Did you make any changes to the system? For example, did you make changes to the hardware, operating system, networking software, or other system components?

•Are you currently using a workaround for the problem? If so, be prepared to describe the workaround when you report the problem.

3. Submit your problem to IBM Rational Software Support. You can submit your problem to IBM Rational Software Support in the following ways:

•**Online:** Go to the IBM Rational Software Support Web site at https://www.ibm.com/software/rational/support/ and in the Rational support task navigator, click Open Service Request. Select the electronic problem reporting tool, and open a Problem Management Record (PMR), describing the problem accurately in your own words.

For more information about opening a service request, go to http://www.ibm.com/software/support/help.html

You can also open an online service request using the IBM Support Assistant. For more information, go to http://www.ibm.com/software/support/isa/faq.html.

•**By phone:** For the phone number to call in your country or region, go to the IBM directory of worldwide contacts at http://www.ibm.com/planetwide/ and click the name of your country or geographic region.

Through your IBM Representative: If you cannot access IBM Rational Software Support online or by phone, contact your IBM Representative. If necessary, your IBM Representative can open a service request for you. You can find complete contact information for each country at http://www.ibm.com/planetwide/.

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